DOCUMENT RESUME

ED 168 219 EA 011 510

AUTHOR	Fullan, Michael; And Others
TITLE	OD in Schools: The State of the Art. Vol. IV: Case Studies. Final Report.
INSTITUTION	Center for Policy Research, New York, N.Y.; Ontario Inst. for Studies in Education, Toronto.
SPONS AGENCY	National Inst. of Education (DHEW), Washington, D.C.
PUB DATE	Aug 78
CONTRACT	400-77-0051; 400-77-0052
NOTE	274p.; For related documents, see EA 011 348 and EA 011 508-511; Not available in paper copy due to marginal legibility of original document
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Administrative Personnel; Administrator Attitudes; Adoption (Ideas); Boards of Education; *Case Studies; Change Agents; Consultants; Curriculum Development; Elementary Secondary Education; Foreign Countries; Graphs; Management by Objectives; Organizational Climate; *Organizational Development; Principals; Professional Training; *Program Evaluation; Questionnaires; School Districts; Success Factors; Systems Approach; Teacher Attitudes
IDENTIFIERS	Canada; United States

ABSTRACT

This volume, the fourth of a five-volume series, contains three onsite case studies of organization development (OD) selected from a sample of 76 school districts. The purpose of the case studies was to analyze in detail different types of OD programs and their use. Each case study represents a different OD focus: case study A involves a survey feedback and professional development approach, case study B combines a management by objective focus, and case study C is curriculum-based. From 13 to 21 interviews were conducted with OD coordinators, central administrators, board members, principals, teachers, and change agents. Questions covered description of the OD program, perceptions of the main goals, reasons for success and failure, role of internal and external change agents, consequences and impact of the program, and the future of OD in the district. Some of the findings suggest the need for a reasonably stable district environment, a close linkage between an internal OD specialist and a top manager, a clear image of the program, and a longer time-line for institutionalization. (Author/LD)

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OD IN SCHOOLS: THE STATE OF THE ART

VOL. IV: CASE STUDIES

BEST COPY AVAILABLE

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EA 011 510

August, 1978

Final report to National Institute of Education, Contract Nos. 400-77-0051,0052.
Ideas and conclusions contained in this report should not be viewed as representing the official policy of the National Institute of Education.

PREFACE

This study of the state of the art of Organization Development (OD) in education consists of a comprehensive assessment of the state of knowledge of OD in education and the nature and extent of use of OD in school districts in the United States and Canada. The study is divided into five separate volumes.

Volume I, Introduction, includes an introduction and overview of the project, and an executive summary of the main findings and conclusions of the different components of the study.

Volume II, Review of Reviews, assesses the state of knowledge of OD in the research literature by reviewing over fifty recent sources. This review concentrates on theoretically and empirically based overviews, comparative studies, commentaries and critiques of OD in general, and OD in education in particular. The review focusses on a review of reviews, but also includes recent major case studies of OD in education. The literature review involves four major themes or aspects of OD: 1) assumptions, values, goals and definitions of OD, 2) operating characteristics (conditions affecting entry, initiation and continuance of OD programs), 3) effects or impact, and 4) the future of OD.

Volume III, OD Consultants/OD Programs in School Districts, consists of two empirical studies of OD in school systems which we carried out. The first study involved identifying and gathering questionnaire data on over 300 OD consultants in education in the United States and Canada. Information was collected on the location, position, background, training, OD approaches and extent of activities of the consultants in working with school districts. Nominations were obtained from the consultants of school districts which they thought were involved in "sustained" (lasting a minimum of 18 months) OD programs. These nominations were used to construct a sample of school districts with sustained OD programs. Detailed information by questionnaire and telephone was collected from a final sample of 76 districts. Data were gathered and analyzed on the size of districts, type of OD program, problems addressed, approaches taken, how the program got started and on a whole host of factors involved in the initiation and operation of the program. Direct information was also obtained on the outcomes of the programs - impact on the organization and on students, attitudes toward OD and its diffusion, and the degree of institutionalization of the program in the district. Multiple regression analyses were carried out to determine the influence of district characteristics, and various operating factors on the outcomes of the OD effort. Several clear and important new findings about the nature, use and effects of OD were uncovered, and are discussed in the report. To the best of our knowledge this study represents the first large scale quantitative analysis of OD programs in school districts.

Volume IV, Case Studies, contains three on-site case studies conducted by us. The three cases were selected from the sample of 76. The purpose of the case studies was to analyze in more detail different types of OD programs and their use. We interviewed a cross section of people in each district and analyzed available documentation. Each case study was selected to represent a different type of OD focus - Case Study A involved a Survey Feedback and Professional Development approach, Case Study B combined an MBO/OD focus, and Case Study C was primarily Curriculum based. The case study themes provided more illuminating and explanatory detail regarding the findings in the district analysis, as well as suggested some new ideas about the use of OD in school districts.

Volume V, Implications for Policy, Research and Practice, summarizes the main results of the project as a whole, sets out a revised working definition of OD in schools, and formulates a series of policy and research recommendations for different organiztions: local school districts, intermediate units, universities, state, provincial and federal government agencies concerned with education. Recommendations for how and if OD should be used and about the future of OD in schools are also discussed in Volume V.

A great deal of cooperation and help made this study possible. We would like to thank the OD consultants and school district personnel who provided so much time and information in giving us a rich array of information on their activities and programs. Leaders and other school personnel in the three case study sites - Winnipeg in Canada, Adams County District No. 12, and Garden City in the United States - deserve a special thanks for spending so much time with us.

Richard Schmuck made valuable suggestions regarding the design of the study. Frederick Mulhauser of NIE was helpful and supportive throughout the study in formulating important policy questions to be addressed. Joan May of OISE worked beyond the call of duty in providing administrative help and coordination. We would like to thank her for her strong support in helping us complete the project.

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INTRODUCTION

The case studies constitute an important component of the overall study because they enable us to examine in detail different types of OD programs. We contracted to do three case studies because we thought that this was the maximum number we could manage while at the same time allowing us to investigate some different types of programs.

The three case studies were selected from our sample of 76 school districts which had sustained OD programs (Vol. III). We used five criteria in selecting the cases. First, we wanted to study cases which were "successful", that is, cases which scored high on all three of our outcome measures - high reported impact, high attitude and high on institutionalization. Twenty-six cases met this criterion. Our goal was to analyze in more detail the conditions for success and the degree of impact of the program in the district. Second, because OD is a somewhat general and diverse concept, we were interested in describing different types of OD programs. In terms of our classification of the general approaches to OD by the districts we planned to include cases which had different primary foci: survey feedback, MBO and curriculum. Third, both the United States and Canada should be represented in the case selection. Fourth, our case selection should involve districts of different sizes ranging from small to medium to large. Fifth, in order to provide new data, we decided to exclude a few cases which had previously been written up as case studies (in particular, we excluded cases in which Richard Schmuck and colleagues had been involved, because they have been described elsewhere in the literature - see the references in Vol. II). In short, although it was obviously impossible to control for all the different factors in our selection and analysis with a sample of three cases, we opted for variety and diversity in the case selection.

The three cases described in the following sections met these criteria in one way or an other. Case Study A - The Winnipeg School Division No. 1 is primarily in the classical OD mode with a heavy emphasis on Survey Feedback and Professional Development, group functioning and organizational norms. The district is located in the city of Winnipeg in the province of Manitoba in western Canada. It is a large city system district containing over 40,000 students, 2000 teaching and related staff in 85 schools. Case Study B - Adams County School District No. 12 is one of a small number of districts in our sample which had an MBO focus to its OD effort. Adams County is a suburb of Denver, Colorado, and can be classified as a medium sized district - 19,000 students, 975 teachers in 25 schools. Case Study C is also in the United States - Unified School District 457 is situated in Garden City, Kansas. The OD program in Garden City has primarily a curriculum change emphasis. The district is small in size, a mainly rural and small urban setting, with approximately 4700 students, 300 teachers and 15 schools.

In each of the three cases, in late 1977 district personnel were invited to participate in the study. All three gave immediate and enthusiastic positive responses. The case studies were conducted through 2 or 3 day site visits in the three month period December, 1977 to February, 1978. Each district was requested to supply all available documentation for the program (descriptions, training materials, evaluation reports, etc.), and to arrange interview times for the site visits with a cross section of district personnel from the following categories - OD coordinator(s), superintendent, other central administrators, Board members, principals, teachers and any available external change agents. From 13 to 21 interviews were conducted with individuals from the above categories.* The interviews took from one to one and a half hours and covered questions about the description of the OD program(s), perceptions of the main goals, reasons for success and failure, role of internal and external change agents, consequences and impact of the program, and the future of OD in the district. The interview schedule is reproduced in full in Appendix A.**

A common framework is used to analyze the three cases. The main common headings consists of sections describing (1) the setting, (2) data base, (3) the OD program, (4) perceptions of goals, (5) reasons for success, (6) problems of implementation, (7) role of internal and external consultants, (8) impact of the program, and (9) conclusions or implications. Data from the district questionnaire (Vol 111) were also used to supplement the case descriptions.

Gib Taylor and Michael Fullan carried out the site study of Case A - Winnipeg - with Taylor being responsible for the write-up of the case. The reverse was true for Case Study B - Adams County - with Fullan being responsible for the write-up. Matthew Miles did both the site visit and the write-up of Garden City - Case C.

Drafts of the case study write-ups were sent to the districts for reaction in order to identify factual inaccuracies or obtain additional information on some points. Only minor changes of clarification and refinement were made. In keeping with the spirit of disseminating information on OD programs we wanted to use the real names of the school districts, but said we would preserve anonymity if they wished. All three districts readily gave permission to use the names of the district and the key personnel.***

The next three sections consist of self-contained descriptions and analyses of the Winnipeg OD Survey Feedback and PD Program (Case A), the Adams County MBO/OD Program (Case B) and the Garden City Curriculum Based Program (Case C). In the final section we compare and contrast the programs and findings in the three cases in order to identify their main implications, in terms of what they contribute to our knowledge about the state of the art and of OD in school districts.

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*The detailed breakdown is contained in each case study write-up.

**Appendices are located at the end of each section, that is, Appendix A appears at the end of the introduction; appendices for the three cases are located at the end of each case in order to preserve the integrity of the case description.

***This touches on a large ethical and practical issue in the doing of case studies. We were fortunate in that we were dealing with "successful" cases, although the data, as will be seen, are by no means all positive. Even within these three cases, careful communication and agreements were necessary. There is limited data available in the literature on the problems and strategies of feedback on case studies. A systematic study, classification and analysis of the issues is very much needed in the field, especially since case studies are now part of almost every major research project.

APPENDIX A
SITE CASE STUDY INTERVIEW

Site ______________Person Interviewed__________Date________

Job title__________________________Suggested by:________________

Explain: NIE-financed study of organization Development programs in school districts in U.S. and Canada. Conducted survey; this is following up in more depth. Aim: understand how OD really works in schools. I will be writing up these interviews into a short case study of the work in this district. Your anonymity will be maintained. The more frank you can be, the better understanding I will have of what went on. (Review what we are talking about: the organizational improvement effort that begun here in_____((give other details so there is a clear frame of referance)).)

(Use copy of filled-in questionnaire for guide in asking questions, probes if necessary; get answers to ambiguous or uncertain questionnaire answers.)

1. What's been your connection to,or role in the OD effort?

2. Could you describe how the OD effort began? (who decided to start, what were the problems that prompted it,what conditions made it possible to begin?)

3. What were the main goals of the OD effort---What were the outcomes that people hoped for? (these might have changed as the work proceeded: how did they?)

4. Please run through the history of the work. What happened first, then as it went along?
FOR EACH ACTIVITY, get: #of people involved, # of person days, What activity was like, whether people thought it was effective or not, and why.

4.b. What else was happening in the district during the time of the OD programe? There might have been other changes projects, mandated programs, shifts in personnel, or other important things we should know about.

4.c. How was the OD effort related to these other things that were going on?

5.a. What do you think helped or aided the work, at various stages?

b. What do you think hindered the work, at various stages?

6. Could you comment on the role of the people who worked as consultants or helpers to the process?
a. First, outside consultants, trainers or change agents. Who were some of these people, and what did they do? What seemed to be helpful or hindering in what they did?

b. Next, inside charge agents, helpers, or consultants--people employed by the district. Who were some of these people, and what did they do? What seemed to be helpful or hindering in what they did?

c. What sort of support structure was there for OD in the district? How did it work out? What did it do to help, and what did it do to hinder the OD work?

7. Considering the OD effort as a whole, we are interested in its consequences, its results. Some may be good, some bad. Some may have been expected, and some may have been surprises.

a. What good consequences do you see, that were expected?

b. Why do you think these results occured?

8.a. There might have been some good consequences that were unexpected, were a pleasant surprise, so to speak. What were some of these?

b. And why do you think these occured?

10. What effects did the OD effort have on the students and their learning (In or out of the classroom?) ? These effects may have been direct, or through teachers and adminastrators.

b. And why do you think these effects occured?

11. What problems or issues would you say the district is facing currently?

12. What is your prediction about the future of OD in the district? Under what conditions might it stop or reduce, continue as it is, or expand?

13. What comments do you have about OD in this country's schools? Do you think it should be used more widely, or not? Why?

14. Any other things on your mind about what we've been talking about?

15. Who else should I be talking to about OD in this district? Why would they be good to talk to?

16. Are there any documents or reports that you can get me copies of that bear on the OD effort?

THANK YOU VERY MUCH.

Case Study A

Winnipeg School Division No. 1
A Survey Feedback and Professional Development Approach

Gib Taylor
Ontario Institute for Studies in Education

(Part of a larger report on the State of the Art of OD in Education, funded by NIE to Michael Fullan, Matthew Miles, and Gib Taylor)

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Appendix A: Winnipeg Professional Development Training Program

Appendix B: Designing O.D. Programs in Response to Current Realities in Schools

Appendix C: Survey Feedback-Action Planning Program (SFAPP)

Appendix D: Administrative Development and Organization Development Program (ADOD)

Appendix E: Curriculum Development Catalyst Program (CDC)

Introduction

The Winnipeg School Division No. 1 was selected as a case study for three main reasons. First, the program was based on a survey feedback approach. Since we were interested in a variety of OD program types, we wanted to include one case which had a more "classical" OD focus on organizational climate and norms. Second, we were doing a study of OD in Canada and the United States. We wanted cases from both countries. Third, in conjunction with the other two cases the Winnipeg case met our criterion of diversity in size--it was an urban school district, larger than the other two cases.

Winnipeg city (population over 300,000) is the capital of the Province of Manitoba, adjacent to Ontario and one of the three prairie provinces of Western Canada. The Winnipeg School Division No. 1 is the main school district of the city of Winnipeg (i.e., excluding suburbs). As such, it consists largely of working class parents. In the questionnaire, it was estimated by the school district that about 70% of the total parent population was working class (30% skilled blue collar; 40% semi or unskilled labour), 20% middle class and 10% upper middle class. There are 65 elementary schools, 9 middle schools and 11 secondary schools in the district. There is a total student population of some 40,000 pupils, with approximately 2000 teachers, 130 principals and vice-principals, and 45 central office administrators and specialists.

Our case study is primarily based on a program which was established in 1974 in one of the three geographical areas of the city,* although some of the programs and interviews concern district wide activities.

Data Base

Taylor and Fullan visited Winnipeg in February 1978 for a three day site study of the program. Two main sources of data were utilized. First, interviews were carried out with 18 people selected from major interest groups. The intent of this variation was to obtain a detailed statement of the various perceptions and opinions within each group. Those selected represented different experiences and viewpoints because of their diverse work related responsibilities. The breakdown of the groups interviewed is as follows:

---

*The school district is organized into three geographical areas, each with its own area supervisor with the title Area Superintendent.

2	O.D. Consultants
2	Area Superintendents
4	School Principals (1 High School, 1 Junior High, 2 Elementary)
5	Teachers (2 High School, 2 Elementary, 1 Junior)
2	Child Guidance Clinic (Area Supervisor, Assistant Director)
1	Coordinator of Community Schools
1	Former President of Teachers Association
1	Consultant
18	

The other sources of information were the records and documentation of the sundry programs and activities carried out over the last three years. The two O.D. consultants were most accommodating in this regard, they diligently went through their files and retrieved over 60 reports that outlined such things as workshops, evaluation reports, rationale for programs, time spent on O.D. activities, etc. The schools supplemented this documentation with specific reports and records of ongoing activities within that particular school.

Both sources of data--the interviews and the documentation--resulted in a massive amount of information. As with the other case studies we have followed a framework which allowed us to organize the data in a consistent manner across the three cases. We start with a description of the origin and nature of the program. Second, we analyze the interviews and documents in order to determine perceptions or statements about goals and purposes, reasons for success, problems of implementation, role of internal and external consultants, and finally, about the impact of the program on organizational functioning and student learning.

Origin and Description of the Program

A brief historical overview is necessary in order to trace events which influenced the initiation and development of the present O.D. program. There seemed to be three major initiating factors. First, in 1973, the Superintendent of the School District appointed a new Area Superintendent, Mr. Keith Cooper, who saw the need for organizational change. Given his perception of the need for organizational change the area superintendent began to use consultants - Dr. Edward Reimer and Mr. Brian Trump - in an O.D. capacity, although they were not formally designated as such until 1975 (see below). The second initiating event was that the two consultants launched a 40 day leadership training program in the spring of 1974. The program was designed to promote and upgrade teacher leadership in professional development activities. The general objective of the program was to train a number of professional development leaders in the division who would be capable of:

a) Aiding in the design and implementation of professional development programs for school staffs, groups of teachers, or individual teachers.

b) Acting as support consultants responding to identified professional needs.

c) Assuming the position of professional development chairmen and representatives in schools.

d) Assisting in the training of professional development chairmen and representatives in schools

The program was designed and co-directed by the two present O.D. consultants. They brought in several recognized consultants in the field to assist with specific sessions. The new Area Superintendent lent strong support to the program and it was co-sponsored by the Local Board of Education and the Provincial Department of Education.

The program consisted of three phases: (1) individual and group growth, (2) group facilitation and, (3) organization development. The overall design of the program was based on cycles of three main goals and activities: 1) awareness; 2) skill building and 3) integration/application (see Appendix A, Reimer and Trump). The various phases were covered in blocks of two or three days per month. Fifty per cent of the time was provided by the School Board while fifty percent was the teacher's own time. There was extensive evaluation carried out and most indicators suggested that the program was successful in achieving its intended outcomes. Twenty-six of the twenty-nine teachers, administrators and consultants who entered the program completed it.

The third major factor which stimulated the development of the program was a School Board motion passed on March 4, 1975 which was intended to decentralize and improve direct support services to schools:

> That the Superintendent be instructed to report back to the Board as soon as possible with a plan for a new flexible decentralized system of support services which could be operable by September 1, 1975.

In June, 1975 the Board passed a motion re-organizing the support services in the Division. In compliance with this motion, the following plan of implementation was submitted to the Board for its consideration. The three major features of the plan were:

a. that an advisory and consultative service readily accessible to the professional staff be established;

b. that the present professional support services program be absorbed, in so far as this is possible, into the new service;

c. that the new service be in operation by September 1, 1975.

This reorganization of the system, to be more decentralized, created 15 new positions. Two of the positions were officially designated with job titles and formal job descriptions in line with O.D. functions. Keith Cooper appointed Ed Reimer and Brian Trump (who had already been working on the leadership training program) to these positions. Their specific job mandates read as follows:

Consultant - Organizational Development

This position is established to provide consulting services to schools and to initiate and organize activities in Area II related to increasing the effectiveness and efficiency of people working together in the school system in identifying and meeting common goals.

Responsibilities will include the following:
1. To assist school staffs in the identification of organizational and professional needs
2. To assist schools in the design, implementation and evaluation of organizational development programs
3. To assist schools in the establishment of organizational systems and climates that are self-renewing, that can initiate planned change, that is organized to meet staff needs, and that is conducive to the development and delivery of programs related to student needs.
4. To initiate and organize training projects related to organizational development
5. To initiate and organize resources that can respond to identified organizational needs.

Qualifications:
1. Experience and demonstrated ability in a broad base of organizational development technology.
2. Demonstrated ability to design and implement organizational development interventions.
3. Demonstrated ability to design and implement organizational and professional development leadership training programs.
4. Experience and understanding in basic concepts of curriculum development.

Consultant - Program Development

This position is established to provide consulting services to schools and to initiate and organize activities in Area II related to program development.

Responsibilities to include the following:
1. To assist schools in design and implementation needs assessment activities.
2. To assist schools in (designing and implementing) establishing and providing goals and objectives.
3. To help schools develop systems for designing, delivering and evaluating instructional programs.
4. To help schools design effective systems for community involvement in their instructional program.

Qualifications:
1. A knowledge of basic research methodology.
2. A working knowledge of systems analysis technology.
3. An understanding of an educational organization would be an asset.
4. An understanding of basic concepts related to instructional programs.

Although the official job description of one consultant is for a program developer most of his work is carried out in close collaboration with the O.D. consultant. Because of this intimate team effort they shall both be referred to as O.D. consultants throughout the remainder of the paper.

Reimer and Trump worked full time in these two positions for the first two years. They were as well senior associates of a consulting firm in Human Resources Management. As the demands from outside the school district increased, both consultants in September 1977 requested to work only half-time for the Board. This continues to be the arrangement to date.

The previous experience of the two O.D. consultants influenced how they have been received by the members of the district. Both were formerly teachers and one was as well a principal, coordinator of special education, assistant superintendent, university instructor at both the undergraduate and graduate levels and a consultant in professional development with the Provincial Department of Education. In addition, their academic qualifications are considerable; one consultant has a Ph.D. in Education and Administration and some training with NTL, while the other has two university degrees and has studied and worked in the area of the applied behavioral sciences.

The combination of experience as educators and expertise in O.D. technology gives them a great deal of credibility. Virtually all of the respondents interviewed answered in a positive manner when asked about the role and efficacy of these inside consultants. They were rated consistently from good to excellent. They were also identified by 50% of the respondents in answering the question "What do you think helped or aided the work, at various stages?"

Another important factor is the time element, just how much time is devoted to working with the various individuals and groups and how it is sequenced. The records revealed extensive documentation on the use of consultants time. In figure one we have reproduced a summary sheet for a particular time period which was submitted by consultant one to the administration. This illustrates the extent and type of sequential time planning involved both individually and of a collaborative nature between the two consultants.

Figure One

Summary Time Sheet of Consultant Activities

Consultant (1) Activities
from February 1 to May 21, 1976

I.

1.	Total number of reported contacts with individual teachers for planning and consultation.	31
2.	Total number of contacts for planning and consultation with groups of teachers other than staff groups.	21
3.	Contacts with staff groups for planning and consultation	9
4.	Non-staff workshop days	25
5.	Staff workshop days	9
6.	Average number of telephone contacts with teachers per day (approx)	6

II. Completed Programs during this period

Consultant 1

1. Park Community Teacher Assistant Training Program
2. School 1 Teacher Aide/ Community Worker Training Program

Joint - Consultants 1 and 2

1. School 2 Staff Development (Goal Setting and Problem Solving)
2. School 3 Staff Development (Team Building and Problem Solving)
3. Mini-Area 1 Principals' Program (Organization Development Orientation)
4. Mini-Area 2 Principals' Program (Organization Development Orientation)
5. School Division Principals' Program (Leadership and Communication

III. Continuing Programs (Jointly)

1. School 4 Evaluation Program
2. School 5 Organization Development Program
3. School 6 Staff Development Program (Goal Setting & Personnel Evaluation)
4. Resource Teachers' Program (Program Design & Consulting Skills)

IV. Future Programs

Consultant 1

1. School 7 Staff Development

Joint - Consultants 1 and 2

1. Administrative Development and Organization Improvement Program
2. School 8 Staff Program
3. Curriculum Development Catalyst Program
4. Evaluation Project (Joint Project of Department of Education and School Division)

Due to the magnitude of the O.D. endeavor (with two consultants full time for two years and then half time for over a year and a half) it would be a mammoth task to describe in detail all the various programs that have been initiated and are presently being carried out in the system. It may be more functional to extract several concepts concerning O.D. programs, approaches and goals from a position paper the consultants prepared entitled "Designing O.D. Programs in Response to Current Realities in School"

They suggest that one must be cognizant of two current realities when designing O.D. interventions in schools:

1. The current mood of financial constraint, coupled with stress on accountability, tend to get administrators trapped into an overbearing concern for short term results. This creates complications for O.D. as a long term process.

2. With expectations of teachers increasing and pressures for change from various sources pushing in conflicting directions, teachers are becoming more insistent and vocal about payoff for themselves as professionals, demanding that interventions address instructional programs directly, practically, and immediately. They are asking, "How will it improve my situation?" "How will it help me do a better job in my classroom tomorrow?" This often leads to the rejection of O.D. as a process of little use without content. (Appendix B)

Considering these realities they have developed eleven design criteria which will facilitate the success of O.D. interventions in schools. These are:

1. the transfer of technology to the legitimate structure of the organization,
2. the use of data from the organization for training content in contrast to simulated or case study data,
3. incremental application of new concepts, technology and skills to the organizational context in a planned sequence,
4. balance between process and task orientation,
5. consideration for both short term and long term payoff for both participating individuals and the organization,
6. commitment, involvement, and ownership by all levels of the organization at every stage of the intervention,
7. clarity of objectives and criteria for measurement of success,
8. responsiveness to the felt need within the organization,

9. integration of (1) new concepts, (2) individual here-and-now experiences, and (3) organizational realities,
10. an appropriate balance between learning and problem solving,
11. utilization of internal resources (appendix B, pp. 1-2).

A number of these criteria have substantial research support. They have been used as a basis for a number of the short term and long term programs initiated in the system. The core of their work centers around three complementary programs for total systems intervention built on these criteria:

1. Survey-Feedback-Action Planning Program
2. Administrative Development and Organization Development Program
3. Curriculum Development Catalyst Program

Which program a school or group of schools or individuals use as an initial vehicle for change depends on their felt need and readiness. Some schools are already involved in more than one program and find they complement one another well. Indications are that more than one may be taken concurrently, or they may be taken in any sequence increasing the possibility of real payoff for the participating system. The three programs have been used in the systems by varying numbers of people depending largely on the recency of the launching of the program. The SFAPP was used in several schools in 1975-76, and is currently being used in one feeder system (elementary, junior high and senior schools, a total of 7 schools). The ADOD program is in the early stages of development and has only been used in a one day orientation session with 20 participants. The CDC program is being used with teams of catalysts in three inner city schools--an elementary, junior high and senior high school. All three programs are essentially catalytic in nature in that teams of representatives from school staffs and administration receive training over a period of time which is expected to lead to ongoing changes. Those who receive training are expected to act as a cadre to provide leadership in change programs within their respective schools. After the initial use of the program, it is hoped that the program processes become an integral part of the structure and technology of the organization for ongoing self renewal.

Aside from the above common design criteria each program has a distinctive theory and applied research base which has been utilized by the O.D. consultants either from personal contact and work with external consultants or from knowledge of the research literature. The SFAPP is based to a great extent on research findings of (1) General Motors O.D. efforts in the late 60's and early 70's, (2) the Institute for Social Research at the University of Michigan, and (3) J. Nisberg and Associates in their work with school systems in the Eastern United States (see Appendix B). Facilitator teams selected from participating schools are given training over a period of several months in (1) design and administration of organizational health surveys, (2) packaging, interpretation and use of data, (3) facilitation of task groups for feedback and action planning, (4) training of workgroup leaders, and (5) evaluation and dissemination of change processes. Facilitator teams assume full responsibility for the process within respective organizations. Data are fed back to each workgroup (e.g., department) within the organization for analysis and action planning over a period of time. After the initial run the process is recycled annually as a regular part of the school's operation. The program was run with a few schools in the system during the 1975-76 school year. Currently it is being run with one feeder system in the Winnipeg Division (seven schools) and a total rural system (outside Winnipeg) with three high schools and a number of feeder schools (See also Appendices B and A).

The ADOD Program provides extensive training over a period of 18 months in O.D. technology and the management of human resources and team development (see Appendix D). From a variety of diagnostic methods and organizational renewal strategies covered in the program, teams select appropriate ones for application to their respective organizations. The program also provides for across systems consultation. It draws from the work of Bennis, Benne and Chin, Havelock, Katz and Kahn, Bowers, Davey and Buckley, and makes use of case studies from a number of organizational interventions. This program is in the early stages of implementation. A one day orientation session has been conducted with 20 participants.

The design for the CDC Program draws from (1) Havelock's work on Planned Change, (2) research on the diffusion of innovations by Everet Rogers, (3) a model for integrating inservice education and curriculum development designed by Robert Westbury and (4) Keith Berry's catalyst program for educational change (See Appendix E).

Teams of catalysts from participating schools are given training over a period of time in the theory of planned change, leadership, task group process, interpersonal communication, consulting skills and curriculum development processes.

Each team in turn provides leadership to respective school staffs in systematic planning for improvement of their instructional program in an area of need identified by them. This program is currently being conducted with three inner city schools, an elementary school, a junior high school and a senior high school.

Running simultaneously with these three system interventions are workshops offered to individual school staffs or principal groups and the like, covering a variety of topics such as leadership, needs assessment, communication and team building.

The two O.D. consultants manage the O.D. program from an educational resource centre located in one of the schools. Both consultants have been heavily involved in the delivery of the O.D. program, and they have also been active with the administration in the strategizing and long term planning.

The remaining aspect of the overall O.D. Program we should like to calculate is the total cost of the various activities both in terms of financial costs and person days. The O.D. consultants estimate that over the three years of the program the cost excluding their own salaries has been approximately $41,000 (questionnaire) - $12,000 has been necessary for released time for teachers and administrators, $2,000 for materials, $20,000 for travel and living costs concerning workshops, etc. and $7,000 for external consultants (questionnaire).* We could estimate a very rough annual cost by including the salary level of the O.D. consultants** and by dividing the above operational costs by one/third.

O.D. Consultant (2 x .50 = 1.0 full position)	=	$25,000	(rough	estimate)
Release time for participants	=	4,000	"	"
Materials	=	700	"	"
Travel/Living	=	7,000	"	"
External Consultants	=	2,500	"	"
		$39,200		

The figures should not be taken too literally, but it appears that the total annual costs are approximately $40,000 - $25,000 for salaries to the O.D. consultants and $15,000 or so for operating expenses. It should also be pointed out that the released time pays for only part (perhaps one half) of the time spent by participants. Teacher and administrator participants expend many more hours in O.D. meetings and individual participation.

Having described an overview of the O.D. program and its origins we can now turn to the perceptions and other data on the goals of O.D. efforts, reasons for success, problems of implementation, role of consultants, and impact on the district.

Goals/Purposes

The Area Superintendent Keith Cooper*** and the two O.D. consultants working in his area generally agreed on the main purposes of the O.D. effort which they felt focussed on self growth and collaboration with other school staff:

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*As we saw from the school district data in Part IV, financial costs are very difficult to determine and should be considered as rough estimates.

**However, it should be recalled that the two O.D. consultants were given existing staff positions, and thus the program did not involve new salaried positions (in effect, the two O.D. consultants were appointed from a pool of subject matter consultancies which meant that proportionately fewer subject matter consultants were appointed in the Area.

***Referred to in the interviews as Area Superintendent A to distinguish him from the other Area Superintendent B whom we interviewed.

> The main purpose was to provide people in schools an opportunity to learn something about decision making and about working together as a staff and identifying issues and questions. We wanted to develop a process to get staff involved in identifying issues and which they could learn to believe in themselves. I wanted to legitimate this. Focus on the individual and belief in oneself. I have twenty-five schools - quite a range. Different conditions apply and these are the people who can identify the needs. The ability to identify needs is a learned behavior. If decentralization is to be more than a transfer of power and include staff involvement in identification of needs and skills in decision making, this requires learned behavior.
>
> (Cooper, area Superintendent A).

> Basically, it would be to provide an environment in a school system that would allow teachers to use their abilities and potential. Allow the system to make use of resources that are there. Teachers that are ineffective and unhappy in a system are provided with mechanisms of changing.
>
> (O.D. Consultant).

> Personally, I like to see people more effective and efficient with what they are doing but also work with a high degree of satisfaction. Excellence, I like to see excellence and have the people see it themselves. A lot of people have a lot of control individually and collectively. That organization structure and policy are there to serve people not control them.
>
> (O.D. Consultant).

The other Area Superintendent who had only peripheral acquaintance with the O.D. program resulting from the occasional loan and use of the two O.D. consultants, as well as an awareness of system activities, stated similar goals:

> First of all, I think we can communicate better. I think the trust level can be raised. We must personalize our communication. I would like to improve staff relationships - teacher-teacher, student, parent, and administration. More sensitivity. I think in education we have focused on program and structure too long. I think we have to focus on people and their needs.
>
> (Area Superintendent B).

The principals and teachers were more general in their concept of what the goals of the O.D. program were. Comments such as:

> I think it is more control of destiny, more direct involvement in decisions. We have a democratic school and are committee oriented. I think the staff was interested in improving the school for the kids. Once people found out what survey feedback could do they found it could improve

> the efficiency of the school. The staff went into it blind. They were given information but they had no training so they really didn't understand. They were just hoping they were going to get something out of it. After the first survey was run they started to understand.
>
> (Teacher)

> I personally saw it as a way people could really get together and quite honestly discuss problems. More or less people changing or changing staff attitudes.
>
> (Teacher)

> My goals would be on the part of staff ownership and commitment. That essentially is that they make decisions wherever possible. The other goal that was mine initially but has become theirs, active involvement and input from the community.
>
> (Principal)

> The main goals are:
> 1. The whole health aspect, a focus on the satisfaction of people
> 2. Good feedback on myself as principal
> 3. Subgroup development, the intermediate group has become recognized.
>
> (Principal)

Two people hint at the dual purpose of individual development and organizational process:

> My understanding, the goal is trying to develop a process so that the community has input into what the school is about. A system of planned change. It is consistent with my ideas. Strong data base and user involvement trains people how to do it themselves.
>
> (Coordinator)

> Immediate goal was to get an internal evaluation model. General goal was to provide for people in the system, to clarify interrelationships, deal with motivation. Looking for a long range change process.
>
> (O.D. Consultant).

To sum up, the goals in most instances are stated in such vague and abstract terms that it is difficult to assess if there is general agreement among all the participants involved in the process at the various levels of the hierarchy. Each person's perception will be tempered by his role in the organization, his knowledge of and relationship to a particular O.D. program or activity. To further complicate matters the O.D. programs and activities offered are often quite different since they are tailored to meet the specific needs of a certain group. On the other hand, there is a thread of cohesiveness touching upon professional and personal growth, more effective communication and decision making that weaves its way through the respondents answers.

Reasons for Success

A content analysis of the interview data to identify what the respondents perceived as the reasons for success of the program was most enlightening. A total of 83% (or 15 of the 18 interviewed) identified the Area Superintendent A as being an important key person. The Area A Superintendent himself suggested that the main reasons for success were:

> Strong support from chief superintendent and I in turn was able to give some support to those in the field who wanted to do it. This program put them in touch with themselves, e.g. I went into a school as a new area superintendent and was going to help people change. I was, by God, going to deliver what they needed. I went into one staff and said I came here to listen to your needs and I was ready to hear about fundamental issues. After silence, one said "Our noon hour is too long". I swallowed and tried to take it at face value. So I worked it through the Board. The Board said sure. I went back to the school and said you did it. They said, "Holy mackerel, we did it!" It was their need we met as an initial success. It turned people loose.

The other two key figures recognized by 67% of the intervieweees as being of primary importance were the two consultants. The two consultants in turn recognized the signficance of the Area Superintendent and list some other reasons why they perceived the O.D. program to be successful. Both O.D. consultants identify the importance of the support by the Area Superintendent:

> The Area Superintendent really supported it. The principals really bought into it and supported it because it met their needs. Taking the time to explain it to people so they could really support it. And arranging the sessions so there could be immediate practical pay-off. I have never violated the steps of the program; needs assessment, objectives, so that we don't come in with a package. My own effectiveness in listening and understanding.
>
> (O.D. Consultant)

> Initially strong support of the Area Superintendent, the combination of strengths and skills Brian Trump had was another reason. And I matched these. The support building of key people like principals. The same principals are really supportive. The timing of bringing an outside consultant was important. I think there was a critical time of getting the board chairman involved and his support. The decentralization and wipe out

> of support service provided a climate of uncertainty which was ripe for O.D. As well we have been able to exist on a low budget only $10,000 for the 40 day training program and $10,000 for the survey feedback program. We have a very low profile with budget.
>
> (O.D. Consultant).

Including the two consultants, 39% of the respondents felt that the role the principal played was critical. Such comments as:

> Certainly, the principal's support is most important even though he did not force the program, it was totally voluntary.
>
> (Teacher)

> The second most dynamic influence after the support of the Area Superintendent is the principal. This thing only works if you have the right kind of boss because of the high risk. He has really been the mainstay.
>
> (Teacher)

> The principal is very supportive but he does not push it or force it.
>
> (Teacher)

The receptivity and support of the teachers was also recognized as a decisive factory by 44% of the respondents.

> Another aspect of the support structure is that to some extent we worked with people in the Teachers' Association. That was not universal by any means but by working with that group and providing some kind of services to that group, then we got the support of the teachers. Coupled with that, the support of one of the area superintendents, that really allowed us to move into all kinds of levels in the system including staff development, working with teachers as well as administrators.
>
> (O.D. Consultant)

> The receptivity of the target group. First staff and then principal. Teaching the skills was very important. For example, here are 10 ways you can block a situation. So the people understand what they are doing.
>
> (Coordinator)

> Another thing is that we make it voluntary and nobody is forced. That is why I think it is growing in strength amongst the teachers in the area.
>
> (Area B Superintendent)

The respondents generally perceived the outside consultants to be good but only 28% of them mentioned outside consultants as contributing to the success of the program. As well only 28% of the respondents mentioned funding as being a significant aspect.

One of the O.D. Consultants summarized the extent and form of funding available:

> There was some external support but very little. By that I mean there was the Department of Education who had a bit of money and there was also an organizational evaluation committee which included representatiqes from the Teachers' Association, Department of Education, Association of School Trustees, Association of School Superintendents and their amount of monies, $10,000, over a period of time was very minimal but it did support some of the survey feedback evaluation project. The project, however, was well underway by the time these people came along and offered to give money in order to have a look at the process and it has continued even though these monies have now run out. So I don't think it had a tremendous effect but it certainly was useful when the money was available. The other thing with that is that both Ed Reimer and I were appointed to consulting positions in the district and these were permanent positions. They were not something extra. As a result, organizationally it appeared that there was support for the kinds of things that we did.

There was an assortment of other reasons mentioned by one or two of the individual respondents as plausible causes of success. Such things as: staff training, develop internal leadership, more communication, the guidance given by the steering committee, time off school and the like. However, the most important and consistently cited reasons were the six that we have already identified: (1) support of the Area Superintendent, (2) work done by the two O.D. consultants, (3) support of the teachers, (4) support of the principal, (5) work done by outside consultants, and (6) funding of program, especially the staff assignment of the two consultants.

Perceived Implementation Problems

The most pronounced implementation barrier identified by two thirds of the respondents centered around peoples' lack of understanding of the program and attitude towards change. Responses like:

> Nothing outright, just the attitudes of people, lack of understanding on people's part. The board has a policy that if anybody wants to get involved with transactional analysis they have to get approval by the board.
>
> (Area Superintendent B)

> The whole question of change itself. We had a lot of conventions where it was assumed that change was a no-no (do what you're told, conflict isn't nice). Something that opens up this isn't accepted.
>
> (Area A Superintendent)

> I think one of the greatest problems was explaining it to people on staff and I don't think we did a good enough job here. The school committee which was in charge of the survey feedback evaluation project understood it clearly but I am not sure of the rest of staff. Last year we surveyed the staff and 1/3 was really supportive, 1/3 was negative and 1/3 non-commital. There is an inservice next week and 1/3 of the staff said they would like to attend and learn more about the survey feedback method. This leads me to believe that some people just don't understand and this is the problem.
>
> (Principal)

> We should have had a better idea of how long the whole task would take or of the Gestalt of the idea. This would have not been the problem if we would have taken all the inservice at once. We ended up spending a lot of time at lunch hours, etc. and people became disenchanted. Also, various staffs are at different levels.
>
> (Teacher)

> Principals and staffs that were very comfortable and fearful of change. Some people just played games, principals put on a facade that they were working yet it was a show for the Superintendent. Myself in a couple of programs I wanted to move too quickly.
>
> (O.D. Consultant)

In the questionnaire the internal consultants referred to the resistance and slow spread of the O.D. program to the other two areas in the school district.

> Lack of understanding, suspicion and resistance by those not involved particularly in other areas in the District. O.D. have been conducted in one area with little information flow to other areas.
>
> (Questionnaire)

The lack of a deliberate strategy to obtain administrative support especially in other areas of the district was recognized as a mistake in retrospect.

> Central office support was limited primarily to one Area Superintendent. It would have been useful to have a broader support

> base at the top. Problems tended to develop when programs involved participants of people from the other two areas in the city system. Also some area administrators with our area could have been oriented to the program much more fully in order to provide a stronger support base within the area.
>
> (Questionnaire)

The time factor was mentioned by 39% of the interviewees as a barrier. All of the comments concerning lack of time were expressed by the teachers and principals.

> We went to a meeting to find out about it and decided if the rest of the school was interested we would do it; if not, we would just go through the motions. We didn't know how to involve the staff in order to gain a consensus, 80% said yes, 20% said no (emphatically). The staff didn't really understand what it was trying to do and people felt they were too busy to add another thing. We had been on so many bandwagons already and fallen off.
>
> (Teacher)

> The reservation was, would the teacher have to put in a lot of extra time to do it. So there was a welfare concern of the Teachers' Association. Another concern was would this be a sustaining thing. Would they keep up their interest? Lack of enough information and time to make better decisions. Lack of unity in the division, with people not being informed or communicating.
>
> (Teacher)

> Lack of time. Other kinds of things that infringe on the Professional Development time. Another thing is financial help, the bucks are lean. I am thinking in terms of a residential, getting the time for that type of thing takes money.
>
> (Principal)

> Using the total staff we needed two full days and that meant we had to shut the school down for that time. The action planning for the two current projects that evolved entailed a lot of time, e.g. two meetings per month. Every second Wednesday, ½ day off. By working 15 minutes every day we "banked" time which helped.
>
> (Principal)

> One that is always a reality-decisions always take a long time to get resolved. The danger of becoming meetinged to death.
>
> (Principal)

> The negative consequence is change was considered to be too slow. They were investing time, but the change was too slow in coming about. That is why the subcommittee is looking into finding some data to support that change is occurring. I would say out of the group 50% would say this is good; 30% wouldn't actively oppose; and 20% are fence sitters.
>
> (Teacher)

Somewhat ironically and perhaps unwittingly, one principal indicated that he had reduced his time with student activities because of the OD program.

> The heavy time commitment required of me which has caused a shift in my use of time. I have cut my work with student activities to spend more time on this--I am a member of the Steering Committee and it meets on noon hours.

Commitment was another factor that was identified by 28% of the respondents and, again, this concern stemmed from the teachers and principals. A teacher working in a high school using the Survey Feedback Program expressed the following viewpoint:

> Not enough determination to really work the data and follow it through. Resistance to developing specific action plans or lack of commitment, coupled with lack of confidence or misunderstanding. Lots of discussion, but no action plans.
>
> Misinterpretation that survey is a means of giving information to administration who, in turn, should solve the problem. Staffs need to see it as their problem. Staffs are more reluctant to be involved in decision-making - it's the administration's job.
>
> (Teacher)

The principal of that same school perceived the commitment to be:

> With a staff of 65 - 1/3 are committed and working on it
> - 1/3 support from a distance, but are not convinced that it is what they are looking for
> - 1/3 not interested or skeptical.
>
> (Principal)

Keith Cooper, possibly because of his role in the system, perceived another type of barrier:

> The biggest barrier is that we are dealing with a transfer of power, and people in power don't like to see it transferred - superintendents and principals.
>
> (Area A Superintendent)

Several other barriers were identified by one or two individuals, such as not enough staff ownership; no indicators that O.D. works, lack of community involvement, unionism attitude of teachers, etc., but, in summary, the biggest barriers to implementation perceived by a large segment of those interviewed appeared to be (1) people's attitude to change and lack of understanding of O.D., (2) the time factor, and (3) commitment level of those involved.

Role of Internal and External Consultants

As indicated earlier, the majority of those interviewed thought both the internal and external consultants were beneficial vis-a-vis the O.D. program's development. This subsection will examine why the particular incumbents thought they were helpful. In total, virtually all (17 of 18) of the respondents thought the two internal O.D. consultants were doing a good to excellent job. Cooper commented on their abilities:

> Their ability to negotiate is very important. It is not helpful when someone comes in knowing the answer. People don't want it, or if they do, it doesn't work.
>
> They have ownership of a support role - they are there to help and confront. They are not there to provide the package or give the answers, but to help them find the answers. Not communicate all kinds of implied judgments about people as being inadequate at this or that. Ability to be where people are and accept it.
>
> They have the basic ability to read the system and help people find their way through the system and their own ability to find a way through. It is highly frustrating. They know they must devise a strategy to work it through the system, carefully rather than running/pushing ahead with a program (system awareness).
>
> (Area A Superintendent)

Two principals felt that:

> They had expertise in the participation arena. They listen and negotiate. They are friendly, alive and enthusiastic, not just tasky and as a result boring.
>
> and
>
> Dr. Reimer gave communication skills training to all the staff and then worked with two trainees who in turn gained expertise to work with the whole staff. He has also acted as a third party evaluator.
>
> (Principal)
>
> Consultants need to be conversant with the theory; need to be available when wanted; good skill developers; no way someone should undertake it from a textbook; need for consultants on the scene for follow-up support; and our consultants have these qualities.
>
> (Principal)

Teachers were of a similar opinion:

> Consultants were helpful - saw what a group could do - NASA simulation plus open plan seminar. This was helpful. Basic communication two days - Overnight-in-Service. Many of us were shaking as to what might happen (we would have to expose ourselves and didn't want to be put on the spot). So they started slowly.
>
> (Teacher)
>
> Consultants keep their noses out of our business unless asked. They don't meddle and ask what you are doing.
>
> When we ask, they are there with the right help. Dr. Reimer did a reorientation for our survey committee who had new members. He came over to meet the whole committee and said what do you want of me. He designed a one-half day semester schedule which was excellent.
>
> He also helped our own staff to give in-service - helped one member plan the in-service.
>
> He gave us external training, but no involvement in our work. We have inside control.
>
> (Teacher)

The coordinator of community schools listed the qualities that an effective consultant should have and that the two internal consultants exemplified:

> The consultants must buy into the user participation model;
> Have a clear understanding of his role as professional educator;
> Have good leadership qualities;
> Be clear and concise;
> No ramming things down people's throats;
> Has to be a people person, earthy and informal.
>
> (Coordinator)

With reference to the outside consultants, they did not rank as high as the internal consultants; only 53% of the respondents stated they did a good to excellent job.

Reimer and Trump relayed the followed perceptions about outside consultants:

> Generally speaking, they were helpful. Their input was minimal. They helped us get the problem going and to bring in new technology. It helped with our own professional growth. With one exposure to their technology, we could take it and move with that and possibly be more effective than they. Our usual mode

> is to take an O.D. consultant, plug him in where we are. Let him use his technology to meet our needs.
>
> (O.D. Consultant)

and

> The outside consultant that we used most often was for the survey feedback action process in relation to system evaluation. We primarily used his model as it applied to various kinds of systems. The background of the model was from the work done at General Motors when the consultant was an internal consultant with that organization, and what we did was take the model, modify it and apply it to educational systems. The external consultant's part in this, beyond that, was to play the key role in the initial training program which was an eight day program and had representatives from quite a number of our schools and the child guidance clinic in the Winnipeg School system. The kinds of things that he did that were useful was having a very clear conceptual model to work from really understanding the parameters of the activities and what was necessary to be accomplished as far as the survey feedback process was concerned. Overall, I would say that he was much more helpful than hindering and we learned a lot from him.
>
> (O.D. Consultant)

On the other hand, the industrial (non-educational) backgroud of the consultant was a problem:

> The areas in which he was hindering was that his background was primarily from the industrial field, rather than education, and this sometimes got in the way. Also, due to the limited time of the training, internal consultants or catalysts did not always acquire the necessary skills for successful implementation in their own systems.
>
> (O.D. Consultant)

The other respondents identified various different factors that hinder a consultant's effectiveness. For example, recall Cooper's earlier comments about Reimer and Trump:

> Their ability to negotiate is very important; it is not helpful when someone comes in knowing the answer. People don't want it or if they do it doesn't work.

He went on to say:

> The "O.D. Trainer" is not helpful because many of them are very much blueprint and mechanistic in their approach and no matter what happens they want to follow their program.

> The combination of O.D. and other training is essential.
> (Area A Superintendent)

Two principals commented:

> The one consultant we make little use of, he is continually grinding his own axe. Comes with his own package. The Central Level, they come with a package also. We have limited contact because it is prepackaged.
> (Principal)

> The kind of person we don't need is the administrative person or someone going around gathering data, they may need this at a system level to do so.
> (Principal)

Finally, it should also be emphasized that the two internal consultants drew heavily on printed materials (training exercises, survey questionnaires, reprints, summations, etc.) mostly by adapting or developing their own material from external sources:

> We developed most of our own material drawing from a great variety of soruces for ideas. Some most used sources are (1) Schmuck's Handbook (2) Lippitt (3) University Associates Material, (4) Survey Feedback Material developed at GM Corp.
> (District Questionnaire)

In summary, it appears there are several factors that facilitate the consultants' effectiveness; namely, his ability to negotiate with people, starting where the people are, not utilizing a prepackaged model or being the expert, having the necessary training and leadership qualities. It is also evident that the use of external sources has been eclectic - a number of different external consultants, ideas and materials, have been used and adapted by the internal O.D. consultants who have integrated these ideas to form a distinctive set of programs for the Winnipeg School system.

Impact of O.D. Program

This section focusses on the more basic issue of whether the O.D. programs have a major impact on the schools. We attempted to determine the impact of the O.D. effort in the interviews, and by examining various evaluation reports on the use of the programs.

The interview data indicates that there is some collective agreement on specific benefits of the O.D. program. For instance, 50% of the respondents thought that the process increased job satisfaction. Comments included:

> The staff now has a sense of stability. They know where

> they stand. They are comfortable. The survey provides this opportunity and it leads to a high degree of satisfaction.
>
> (Teacher)

> I don't know how to measure that. I have a gut feeling that if teachers are more satisfied with their job, then they relate better with kids.
>
> (Teacher)

> I don't know. No measurement has been done. I think the people are more satisfied, those that really got involved in it, and have a positive attitude about the school and its organization which may be reflected in the classroom.
>
> (Teacher)

> I think we have a new organizational structure as a result of the O.D. effort. I think it was a good change. The other O.D. efforts have led us to feel good and more satisfied, a process type of thing.
>
> (Child Guidance Personnel)

Another perceived impact as a result of the O.D. program was better communication among staff, 40% of the respondents mentioned improved communication.

> There are effects for student-teacher communication with each other and communication with the parents really improved. More appropriate placement programs and use of other resources, especially parents. I dealt with a few behavior problems at first when they all came to me. The teachers use more of a team approach now.
>
> (Principal)

> Teacher morale has improved because communication has improved. There is much more planning and sharing.
>
> Teachers keep on coming back for workshops.
>
> (Teacher)

> Communication in school was identified as a problem and an outgrowth was that we started a paper, "Monday Morning Blues", with everyone putting any important information into it on a weekly basis. We had student problems that are now identified by the groups. We still do not have good communication across workshops. Subgroups are working together - direct decision of in-service feedback to follow-up on ideas.
>
> (Teacher)

Feedback was mentioned by a few as being a beneficial type of communication.

> Feedback to principals in the survey led to some heavy negative feedback re one of them. There has been some improvement since.
>
> (Teacher)

> Most of us feel, if there is a concern there is a device for getting information, honest feedback (all of the staff don't feel that way). But I do as principal. The survey provided a total reading of 95% of the staff and this causes me to examine how I carry out my responsibility.
>
> (Principal)

Another related area where substantial agreement that effective change had occurred was in the field of decision-making, 43% of the respondents mentioned this. This was an objective of the O.D. consultants, as one indicates:

> Another consequence generally that we were looking for is that people would have much more appropriate decision-making power and that they could have input into what was actually going on more effectively, rather than have things filter down through the system. Related to this is generally the whole process of communication begins to open up and be more effective and be more realistic, too. By that I mean people don't have to know everything that is going on, but they certainly have to know what is going on in the area in which they are involved so they can make informed decisions.
>
> (O.D. Consultant)

Cooper concurs with this objective and states:

> The schools who have involved themselves in this staff training are much further along in decision-making, development of action plans and making demands on me. We have done it in two ways: (1) individuals (2) staff as a whole.
>
> (Area A Superintendent)

A school principal perceives:

> The staff ownership and commitment is there. They have assumed responsiblity for budget, personnel, P.D., student placement, program workgroups, they meet regularly, and make decisions about us becoming a community school.
>
> (Principal)

Two other teachers expressed the following sentiments:

> For the first time, the Survey Development Committee is

> really starting to discuss gut issues (who makes decisions, who's responsible). We are now identifying very specific questions instead of the general ones we used in the past. More of an openness to confronting issues in specific terms; e.g. performance of the principal with regard to inconsistency in decision-making; budgeting is another. New people on committee are coming up with these, e.g., staff/student relations.
>
> (Teacher)

> I feel there is a change in people. I feel I have become a better teacher and department head as a result of this. I feel the staff has developed a more democratic way of working and making decisions, and I think that this is a direct consequence of the process we went into. I think it has made us more responsive for the need to change as a staff.
>
> (Teacher)

One of the central staff summed it up this way:

> Some of the indicators for impact is more staff input in decisions. The ability of administrators to let staff have input, yet they still have control. Then the staff letting kids and parents have input into things.
>
> (Central Staff)

As for bottom line impact at the classroom level or change that affects kids, there is a paucity of hard data. About 62% of the respondents identified some isolated indicators that suggested different forms of change were occurring. The two O.D. consultants stated:

> Our emphasis has been working at the organizational level and there is a lot of soft data relating to teacher attitude and school climate. I have the feeling that things are happening at a classroom level and new programs are being developed, but I don't have the data yet.
>
> (O.D. Consultant)

> Generally there has been no direct link between our program and student learning. However, one of the things we do is gather external performance measures - is the change program bringing about change; to what degree; and what evidence is there of this - and the individual schools do identify these external performance measures. Very often some of the external performance measures are directly related to student learning and they work that kind of correlation.
>
> (O.D. Consultant)

Even though their focus was directed at a more system or organizational level, both O.D. consultants could cite examples that signified certain specific types of change had filtered down and were occurring at the classroom level. For example:

> One specific incident that comes to mind is the survey feedback program in one of the schools. The intermediate group of teachers, about six or seven people, identified as one of the areas of concern student behavior in the classroom, attitude towards each other in school and attitudes towards teachers, to the building, to materials and to each other on the playground, etc. What they did was set up a program to modify student behavior through behavioral objectives--a behavior modification program. They supported each other through this and over a period of time they documented the results. There were specific behavioral changes as far as students were concerned and their own behavior also improved as far as working together and with the students.
>
> Specifically one school identified program development and curriculum development as necessary and did in fact become involved in the curriculum catalyst program which was directly related to improving programs in order to meet student needs and out of this there is some documentation of student improvement.
>
> Another area was having students involved in the evaluation of their teachers and the system in which they operate. This happened in one high school in particular, and it also happened in one elementary school in which all the students from nursery school to Grade Six evaluated their teachers, evaluated their classroom and how they felt about it (an attitude survey).
>
> (O.D. Consultants)

The principals as well offered examples:

> Indicators of impact - some teachers may work with different groups of students and the needs of the school. What we realized was that we had lots of different levels in the school, but the programs didn't deal with all the varied levels of the students. The office said there was less student behavior problems. Everybody was thinking of individualizing for the kids. Language Arts teachers would set up at least two groups to accommodate the remedial reading program. Every teacher is grouping for Language Arts. This was a direct follow-up of the program. This grouping was not done before.
>
> (Principal)
>
> Pupil behavior project - stroke them, make them happy, give rewards like buttons. The project has enabled us to focus on the kids and this has been central to their happiness. Also

> staff is more cooperative, goodfeeling, joking around, this filters down to kids.
>
> (Principal)

> Absenteeism is a good example;we have a high transient level 300-400 kids a year. I think there has been some improvement in attendance. Our average is up from about 82% to 87%.
>
> (Principal)

In addition, the teachers specified particular changes in the school:

> It has affected the kids because one of the problems the staff came up with was student behavior as a result of the survey. So we initiated certain things primarily the intermediate work groups. For example, every two weeks we have citizenship awards where kids are given pins. And basically talking to the kids about behavior and using positive reinforcement. The last survey indicated there was an improvement. There were times workgroups combined efforts. The Curriculum Development Catalyst Program was a spinoff of the Survey Feedback.
>
> (Teacher)

> I feel it really improved my own understanding of the organization of the classroom and as a result I changed my teaching habits.
>
> (Teacher)

One other indicator that the O.D. program is having positive impact on the system is the positive responses to the questions, "What comments do you have about O.D. in this country's schools? Do you think it should be used more widely or not?" The majority 85% thought that it should be used more widely which would suggest the respondents perceive it to be a worthwhile endeavour.

There were some negative consequences to the O.D. effort. The O.D. consultants identified three problems they encountered:

> In some cases, you have basically weak administrators who are looking for an easy out. If principals use the technology in a manipulative sense, it creates problems;if you do this too much then this inhibits the process.

> One that comes to mind and reflects on me is in a couple of situations I have mis-diagnosed, either from a lack of probing or my lack of ability or whatever. But the surface issues were not the real issues. The program did not work well and I think there were some spinoffs that were beneficial, but as far as the focus of the program, I don't think it worked.

> Another one that comes to mind as well is that sometimes if you build up a high trust climate internally in a subsystem

> such as a school, people operate at a much different level and in a much different way than the extenral system. What you are doing sometimes is building up expectations, giving people more knowledge, and as a result they become discontented with the external parts of the system and that has happened in three cases.
>
> (O.D. Consultants)

The other source of data on quality and the impact of the O.D. programs is the various evaluation reports which have been compiled on specific uses of the program. The three complementary programs - Survey-Feedback-Action Planning Program (SFAPP), Administrative Development and Organization Development Program (ADODP) and the Curriculum Development Catalyst Program (CDCP) - are presently in various stages of implementation. In some cases, it may be too early for meaningful evaluation, but the reports containing current evaluations of the programs indicate considerable promise in specific areas. Two of the programs (SFAPP) and (CDCP) have been implemented in various schools and have been the subject of written evaluation reports. These reports are attached as Appendices C (Trump 1977 and Reimer 1977).

Appendix C contains a report on the SFAPP program in use in an elementary school, a high school, and several other participating schools. In the elementary school, data are reported which indicate that teacher absenteeism has declined (2.75 days a month) and teacher turnover has been reduced to a zero level over the past two years compared to an average of 7 per year for the previous two years. There is only a minor indication that students have been affected: there is a slight but not significant gain in results on standardized tests; pupil absenteeism has not changed; and pupil satisfaction data have been retained by teachers (i.e., the data are not available).

The findings on the high school SFAPP program indicate differential impact on teachers, and give no data on students. As stated in the report:

> It would appear that about one third of the staff has an attitude of acceptance toward the project. A slightly smaller number appears to have an attitude of rejection. The remainder, approximately one third, reveal an attitude of non-commitment.
>
> Positive responses seem to come from teachers who find the process to be an influence in the organization of the school, particularly departments, and a stimulus to professional growth.
>
> Negative responses seem to come from teachers who look for concrete, measurable change and do not see it.
>
> The large number of respondents who are not sure may also reflect the lack of specific objectives of the project. As a staff, we

have not decided what measurable changes we want.

(Appendix C)
(pages not numbered)

Participants' ratings from other schools involved in the SFAPP program also show quite high satisfaction. Nearly all of the mean scores concerning the usefulness of the program are above 4.0 (some well above 4.0) on a five point rating scale (Appendix C)

An evaluation report on the Curriculum Catalyst Program was completed in June, 1977 (Appendix E). Three schools participated in the program. Again, the program evaluation sheet shows uniformly high degrees of satisfaction (means around or above 4.0) with only two exceptions out of some twenty-four scores*. Also, once again, there are no data on student impact.

As for the Administrative Development and Organization Development Program, there was no quantitative data available. A report submitted to the Acting Superintendent on the Professional Development Program for Principals on the theme of Organization Development states:

> The evaluations indicate a consistently high degree of satisfaction with the program. Responses indicate that principals found the program informative, stimulating, well organized and presented, and relevant to their situation as educational leaders. There is no evident pattern in the criticisms that were elicited.
>
> (Reimer 1976)

In addition to these three programs, The ADODP, the SFAPP and the CDCP, there are reports on 18 miscellaneous O.D. type workshops conducted by the two O.D. consultants. These were essentially single training experiences of school staff focussing on team building, group process, goal and task clarification and action planning. A typical report included: (1) an outline of the program; (2) program evaluation summary; (3) summary of pre- and post-teamwork effectiveness evaluations; and (4) conclusions. These reports also show high degrees of staff satisfaction.

One of these reports includes an enlightening summary of the status of evaluation of the O.D. effort:

> A common critique of O.D. programs is that there is not sufficient evaluation. In this particular case we have been examining, there has been a concentrated effort to carry on continuous assessment of individual workshops and long range programs. Generally, the interview data and the documentation illustrate that the O.D. program is positively received. In

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*The two exceptions concern cross group or cross organization interaction - "links between schools" (mean = 2.6) and "interaction with other groups" (mean = 2.5).

addition, there are indications that some first level change is occurring with the immediate recipients of the O.D. training. However, there is paucity of evidence to demonstrate that second level change is occurring at the school or classroom level. This latter statement should not be misconstrued since all research indicates that sustained behavioral change usually takes a long time to arrive and this program has only been in existence for a few short years.

The consultants also estimate that the O.D. program has become institutionalized in the one Area of the district, and that it will spread only slowly throughout the district. After responding on the questionnaire that the O.D. owrk will continue in the district they elaborate:

> Support has been built by its success. There is a long term strategy planning. I believe it will continue and spread to other areas slowly. I don't anticipate much acceleration in the immediate future.
>
> (Questionnaire)

As to the desirability of the diffusion of O.D. to other school districts, as might be expected the O.D. consultants are strongly in favor and have been disseminating their work mostly through personal contact and appearances. To the question of should O.D. be used more widely the answer was "Definitely, think so" (the strongest reply on a five point scale). Dissemination has been carried out through "visits to other districts to explain the work", "informal contact with people from other districts", "explanations of the work at conferences", and "written articles in journals, newspapeers" (Questionnaire)*.

Conclusions

It appears that numerous benefits have been achieved since the O.D. program's inception in 1974, namely, increased job satisfaction, better communication and improved working relationships of those who have been involved in the program. The data point to some key factors as having influenced the program's development. These are:

(a) In 1975 the Board decided to decentralize and created fifteen new positions, two of which were filled by the (two) internal O.D. consultants.

(b) The strong support given by the Area Superintendent to the program in general and the two internal consultants in particular.

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*Since Reimer and Trump have their own consultancy firm with 50% of their time available for work external to the Winnipeg system, there is perhaps more of an incentive in this case study to disseminate the program.

(c) In addition to their expertise in O.D. technology the teaching and educational backgrounds of the two consultants enhanced their credibility. They were both experienced teachers and one, as well, was an educational administrator.

(d) The specialized expertise which outside O.D. consultants brought to the program.

(e) The amount of time devoted to the program is important. The two consultants worked full time for two years and half time for a year and a half. Over this same time period they estimated that some 4000 person days from school staff have been invested by participants.

(f) The consultants did not prepackage the program, but always negotiated and tailored the program to fit a specified need.

(g) The receptivity of the teachers and principals, possibly resulting from current realities stressing accountability among other things.

(h) The continuous evaluation of the progress of various aspects of the program, constantly notified the Board and the participants that specific gains were being achieved. Workshop and program evaluations also indicated that the participants had positive impressions of the experience.

(i) Funding to cover necessary expenses such as release time substitutes, materials, external consultant fees and travel for professional development never appeared to be a barrier.

The biggest problem concerns the slow spread of the O.D. program to the other two areas of the district. Once again we see the importance of administrative support. We also see some problems which are more intrinsic to the development of O.D. such as the difficulty of precisely defining the goals of O.D. in the way which would be users can comprehend them, and the difficulty of pointing to tangible results, especially for students. Both these factors seem to inhibit the spread of O.D. to the unconverted.

It almost sounds mundane to reiterate the fact that significant attitudinal and behavioral change arrives very slowly upon the scene, since the large body of literature addressing change emphasizes this point. Even if one is guided by sound O.D. technology, and careful plans, the establishment of successful change efforts on a district wide basis is very problematic. The O.D. program in the Winnipeg School Division has apparently made some initial successful inroads in several schools. Even within these schools there is little or no data which show that the program has affected students. As with the other cases and data in our study, apparently O.D. programs take at least two or three years before they affect teachers and other staff, and possibly several more years before their impact on students can be determined with no guarantee that the results will be positive.

References

E. Reimer, "Report to H. Pollock On the Professional Development Program for Principals on the Theme of Organizational Development May 10-12, 1976", Winnipeg School Division No. 1

E. Reimer, "Report on the Winnipeg Curriculum Development Catalyst Program" 1977, 14 pp. (Appendix E in this case study)

E. Reimer and B. Trump, "Winnipeg Professional Development Training Program" (no date), 4 pp. (Appendix A in this case study)

E. Reimer and B. Trump, "Designing O.D. Programs in Response to Current Realities in Schools" (no date, 3 pp), (Appendix B in this case study)

R. Schmuck, D. Murray, M. Smith, M. Schwartz & M. Runkel Consultation for Innovative Schools: OD for Multiunit Structure, Center for Educational Policy and Management, University of Oregon, Eugene, Oregon, 1975.

B. Trump, Interim Report on the Churchill Evaluation Project, Winnipeg School Division, 1977 (Appendix C in this case study)

Winnipeg School Division, "Administrative Development and Organization Improvement Program for the Winnipeg School System" (no date, 4 pp. Appendix D in this case study).

APPENDICES

Appendix A:	Winnipeg Professional Development Training Program
Appendix B.	Designing O.D. Programs in Response to Current Realities in Schools
Appendix C:	Survey Feedback-Action Planning Program (SFAPP)
Appendix D:	Administrative Development and Organization Development Program (ADOD)
Appendix E:	Curriculum Development Catalyst Program (CDC)

APPENDIX A

Winnipeg professional development training program

Edward P. Reimer, B.A., B.Ed., M.Ed., Ph.D.
J. Brian Trump, B.A., B.Ed.

Introduction

During the past two or three years there has been increasing emphasis on the professional development of teachers and administrators in the Winnipeg School Division. This emphasis has been paralleled by a trend towards more teacher initiative in professional development as a by-product of decentralization. Early in 1974 professional development committees were organized in each of the three areas in the system. In addition, most schools established their own professional development committees. These committees were expected to provide leadership in planning and conducting workshops and other activities.

To promote and upgrade teacher leadership in professional development activities a leadership training program was initiated in the spring of 1974, co-sponsored by the Winnipeg School Board and the Manitoba Department of Education. It was a forty day training program designed and co-directed by J. Brian Trump and Edward P. Reimer, conducted over a twelve month period.

The purpose of the program was stated as:

> The objective is to train a number of professional development leaders in the division who would be capable of:
>
> (a) Aiding in the design and implementation of professional development programs for school staffs, groups of teachers, or individual teachers.
>
> (b) Acting as support consultants responding to identified professional needs.
>
> (c) Assuming the position of professional development chairmen and representatives in schools.
>
> (d) Assisting in the training of professional development chairmen and representatives in schools.

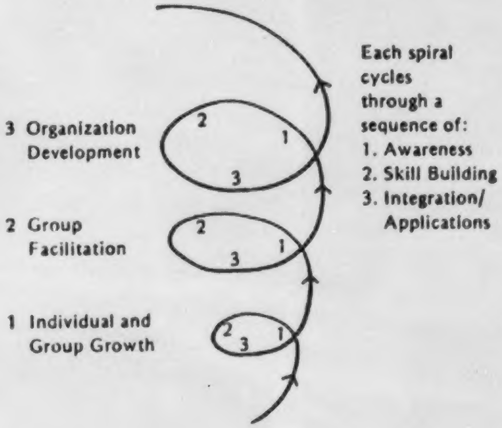
The program was conducted in blocks of two or three days per month. Fifty per cent of the time was provided as release time by the School Board. Fifty per cent of the time was the teachers' own time. Twenty-six of the twenty-nine teachers, administrators, and consultants who entered the program completed it.

Program Description

The program consisted of three phases:

1 Individual and Group Growth
2 Group Facilitation
3 Organization Development

The over-all design of these three phases can be portrayed as a spiral model.


3 Organization Development
2 Group Facilitation
1 Individual and Group Growth
1
2
3
Each spiral cycles through a sequence of:
1. Awareness
2. Skill Building
3. Integration/ Applications

The pattern was to move from Phase I, which focused on the individual and his functioning within a group setting, to Phase II which focused on facilitating the functioning of work groups, and finally Phase III, which focused on the functioning of various groups in an organizational setting. Each phase or spiral cycled through a sequence of awareness of concepts and processes, building of skills, and integrating and applying these to actual situations on the job.

The following expectations were placed on the participants. They were to keep a formal journal of all sessions and activities outlining (a) actual events, activities, instrumentation, and (b) personal reactions, feelings, impressions, evidence of learning and development. At the beginning of each workshop session participants met in ongoing evaluation groups to monitor the learning, growth, and development of its members. Participants were encouraged to set up a program of related reading.

A brief description of each phase and its training components follows:

Phase I Individual and Group Growth
(Fall 1974)

The primary purpose of this phase was bi-fold. One was to have the participants become more aware of how individuals, especially themselves, behave and function as they work with others in a group. The second primary purpose was to build a learning environment in which individuals could experiment with various behaviours in order to become more effective as leaders and members of groups.

Following an orientation session in June 1974, three workshops were held in Phase I through the fall of 1974. The first workshop dealt with self-awareness and community building. The personal awareness sessions consisted of structured small group activities. The design for these activities was based on the Johari Window Model. The issues of leadership and community norms were dealt with as well. The second workshop focused on building skills to help individuals to function more effectively in groups. This was accomplished by observing and experimenting with individual behaviour in group settings. Three models were used as frameworks for dealing with behaviour. These were the "Inclusion-Affection-Control Model," the "Maintenance-Individual-Task Role Model," and the "Gestalt Contact-Confluence-Avoidance Model." The final workshop of this stage dealt with the integration of individual and group processes. The conceptual base for the workshop was provided by the "Core Process," a model that integrates individual, group, and organizational processes for the release of creative energy at all levels. Other processes were used for problem solving such as "Force Field Analysis" and Weinstein's "Trumpet Model." The group went through strength building activities that were applicable to actual at home situations.

Phase II Group Facilitation
(Winter '74/75)

The purpose of this stage was to develop further insights into the dynamics of groups. Another focus was to help the participants learn and apply skills necessary to become effective group leaders or facilitators.

The program again cycled through the process of awareness, skill building, and application, though this time it was at a more sophisticated level. Participants experienced a "Gestalt Lab" following assigned reading. This was intended to help them become more aware of their own strengths and abilities as group members. A "Facilitator Training Lab" focused on consolidating skills into a conceptual framework. It also provided the opportunity to practise group leadership and interventions. Each participant was required to make a planned intervention in his at home system. In preparation for the actual intervention, each trainee went through a role play feedback process with his evaluation group. This was done as a homework assignment. The last workshop in this phase was a "Transactional Analysis Lab," which provided the participants with a model for systematic cognitive integration of personal learnings to this point.

Phase III Organization Development
(Spring '75)

The objective of this phase was to have the trainees develop the ability to relate and to apply learnings in personal, interpersonal, and group processes to the dynamics operating in larger complex organizations. This was to provide participants with a basis for successful initiation, design, and delivery of professional development programs in their own system.

Morton's "Organization Development Laboratory" was used to create an awareness of the complexity of organizational practices and processes. This was followed by a "Program Design and Presentation Workshop." This workshop put the participants in teams of four to six, through a sequence of (1) related readings, (2) diagnosing organizational needs, (3) building a program which included stated objectives, delivery strategies and evaluation criteria, (4) delivering the program, and (5) debriefing and

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The number of responses vary as a few of the workshops were missed by one or two people. A number of participants were out of town during the evaluation session. Also, a few teams did not complete their practicum until after the evaluation session.

It may be significant that evaluations of the over-all program are higher than the arithmetic average of individual workshop ratings. This suggests the cumulative effect of the over-all design.

A follow-up study conducted in April 1976 of activities of participants directly related to the program objectives reveals the following statistics:

1. Nineteen had been actively involved in conducting professional development activities.
2. Five had conducted training programs for professional development leaders.
3. Six were members of professional development committees.
4. Seven were chair persons of professional development committees.
5. Six were members of Advisory Committees established in September 1975 to advise the three Area Superintendents on policies and procedures related to the reorganized Educational Support Services and the newly established Educational Resource Centres.
6. Six had received promotions within the system since taking the Leadership Training Program.
7. One participant coordinated the operational aspects of setting up six Education Resource Centres throughout the system.
8. One participant directed a major organization development intervention in a large urban high school, using a survey-feedback-action-planning model.
9. Six principal participants had initiated organization development activities in their schools.
10. Four principal participants had organized major community school programs, with considerable involvement of teachers and parents in education decision-making.
11. Four participants had entered a Master's program in Behavioural Science, specializing in Organization Development.

Conclusions

All indicators suggest that the program was highly successful in achieving intended outcomes. The success and extent of participants' involvement in professional development activities throughout the system is particularly significant in view of the fact that there was no initial screening of applicants. This involvement and continued concomitant growth has been facilitated by the fact that the trainers as internal consultants are available for at home support.

It may also be significant that when the total support service system was reorganized in June 1975, the co-directors of the training program were both given newly created consulting positions within the new system.

The Professional Development Leadership Training Program contacts now facilitate entry into all levels of the system for ongoing organizational renewal and program development.

Assigning credits for maturity

R.J. Duhamel, B.A., M.Ed., Ph.D.
C.E. Bruder, B.A., M.Ed.

Selecting appropriate and meaningful criteria for judging the maturity of adults returning to study is becoming increasingly important as more and more people choose to return to formal studies. While it is generally agreed that whatever criteria are utilized for the making of judgements and decisions concering a person's return to study – flexibility must be maintained in their application to each student's individual case – there has not been a significant amount of discussion on the topic, that is the application of criteria. The purpose of this paper is to examine a very specific problem arising from the administration of an Ontario Ministry of Education document designed to facilitate the entry of students into the school system (Memorandum 1973-74: 18 re Equivalent Standing for Mature Students, now an integral part of High School I.)

The educational official whose task it is to assign maturity credits, either the twelve allowcritiquing the process. The next step was to have the participants establish practicum teams that made entry into individual schools or other sub-systems in the school division. These teams then went through the above sequence in the actual organization setting. Each step in the practicum was critiqued by the teams and the consultants. Each team was required to evaluate the effect of its intervention.

During the final session the Area Superintendent responsible for initiating the program conducted a systems awareness session focusing on the organizational realities of a large system such as the Winnipeg School Division. Finally, the total program was debriefed and evaluated. There was also some planning related to ongoing professional development in the school system.

Evaluation

Two strategies were used to evaluate the program: (1) a comprehensive evaluation form completed by participants during the final session, and (2) follow-up of participant activities.

Participants rated the contribution of the overall program to their development and learning on a nine point scale (1 = low, 9 = high.) Results are summarized in Table 1.

Table 1

Evaluation of Overall Program

	N	S.D.	Mean
(a) Facilitator skills	21	1.3	7.5
(b) Planning and design skills	21	1.1	7.8
(c) Personal and professional growth	21	1.3	7.8
(d) Increased effectiveness	20	1.3	7.8

Participants also rated (1) Content, (2) Process, and (3) Resource People for each session on a nine point scale.

Table 2 summarizes the responses.

Table 2

Evaluation of Individual Workshops

Workshop	Content			Process			Resource People		
	N	SD	Mean	N	SD	Mean	N	SD	Mean
1. Self-awareness and Community Building	19	1.9	5.9	19	2.2	5.8	20	2.0	5.9
2. Group Process	20	1.3	7.4	20	1.3	7.4	21	2.0	6.9
3. Integration of Individual Group Processes	20	1.2	7.5	20	1.1	7.7	19	1.6	7.3
4. Gestalt Laboratory	20	1.9	6.4	19	1.4	7.3	20	1.6	7.1
5. Intervention and Facilitator Skills	19	1.5	6.9	19	1.3	6.8	19	1.4	6.7
6. Transactional Analysis	20	1.5	7.2	20	1.4	6.8	20	1.7	6.5
7. Organization Development Lab	19	0.9	7.7	20	1.5	7.8	20	1.5	6.9
8. Program Design and Delivery	20	0.8	8.4	19	0.7	8.4	19	1.1	7.8
9. Practicum Experience	17	1.1	7.8	17	1.1	8.2	15	1.8	7.5

APPENDIX B

DESIGNING O.D. PROGRAMS IN RESPONSE TO CURRENT REALITIES IN SCHOOLS

During the past three or four years we have done consulting work with six of the nine school divisions (districts) in Metropolitan Winnipeg, about a dozen rural school systems, and a variety of other educational organizations. Our experiences have made us increasingly aware of two current realities with important implications for designing O.D. interventions in schools:

1. The current mood of financial constraint, coupled with stress on accountability, tend to get administrators trapped into an overbearing concern for short term results. This creates complications for O.D. as a long term process.

2. With expectations of teachers increasing and pressures for change from various sources pushing in conflicting directions, teachers are becoming more insistant and vocal about payoff for themselves as professionals, demanding that interventions address instructional programs directly, practically, and immediately. They are asking, "How will it improve my situation?" "How will it help me do a better job in my classroom tomorrow?" This often leads to the rejection of O.D. as a process of little use without content.

On the basis of our experience with a variety of programs we have developed a number of design criteria that have been useful in responding to these realities. The success of O.D. interventions in schools is directly related to:

1. the transfer of technology to the legitimate structure of the organization,

2. The use of data from the organization for training content in contrast to simulated or case study data,

3. incremental application of new concepts, technology and skills to the organizational context in a planned sequence,

4. balance between process and task orientation,

5. consideration for both short term and long term payoff for both participating individuals and the organization.

6. commitment, involvement, and ownership by all levels of the organization at every stage of the intervention,

7. clarity of objectives and criteria for measurement of success,

8. responsiveness to the felt need within the organization,

9. integration of (1) new concepts, (2) individual here-and-now experiences, and (3) organizational realities, and

10. an appropriate balance between learning and problem solving, and

11. utilization of internal resources.

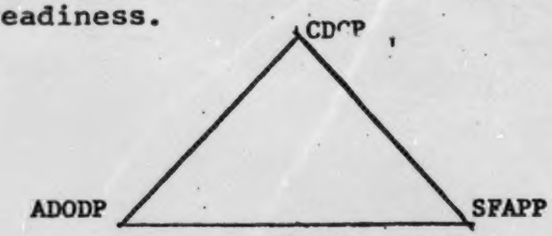
A number of these criteria have substantial research support. They have been used as a basis for a number of our short and long term programs I will briefly outline a core of three extensive complementary programs for total systems intervention built on these criteria:

1. Survey-Feedback-Action Planning Program

2. Administrative Development and Organization Development Program

3. Curriculum Development Catalyst Program.

The following triangle suggests the relationship between these programs. Which program a system uses as an initial vehicle for change depends on its felt need and readiness.



All three programs are essentially catalytic in nature in that teams of representatives from participating organizations receive training over a period of time. They in turn provide leadership in change programs within respective systems. After an initial run through the program processes become an integral part of the structure and technology of the organization for ongoing self renewal.

Aside from the above common design criteria each program has a distinctive theory and applied research base. The SFAPP is based to a great extent on research findings of (1) General Motors O.D. efforts in the late 60's and early 70's, (2) the Social Research Institute at the University of Michigan, and (3) J. Nisberg and Associates in their work with school systems in the Eastern United States. Facilitator teams selected from participating schools are given training over a perio of several months in (1) design and administration of organizational health surveys, (2) packaging, interpretation and use of data, (3) facilitation of task groups for feedback and action planning, (4) training of workgroup leaders, and (5) evaluation and dissemination of change processes. Facilitator teams assume full responsibility for the process within respective organizations. Data is fed back to each workgroup(e.g. department) within the organization for analysis and action planning over a period of time. After the initial run the process is recycled annually as a regular part of the school's operation. The program was run with a few schools in Winnipeg during the 1975-76 school year. Currently it is being run with one urban feeder system and a total rural system with three high schools and a number of feeder schools.

The ADOD Program provides extensive training in O.D. technology and the management of human resources to administrative teams from participating systems over a period of eighteen months. From a variety of diagnostic methods and organizational renewal strategies covered in the program, teams select appropriate ones for application to their respective organizations. The program also provides for across systems consultation. It draws extensively from the work of Bennis, Benne and Chin, Havilock, Katz and Kahn, Bower, Davey and Buckley, and makes use of case studies from a number of organizational interventions. This program is in the early stages of implementation. A two day orientation session has been conducted with 20 participants.

The design for the CDC Program draws from (1) Havilock's Havig~~hurst~~'s work on Planned Change, (2) research on the dissemination of innovations by Everet Rogers, (3) a model for integrating inservice education and curriculum development designed by Robert Westbury and (4) Keith Berry's catalyst program for educational change.

Teams of catalysts from participating schools are given training over a period of time in the theory of planned change, leadership, task group process, interpersonal communication, consulting skills, and curriculum development processes.

Each team in turn provides leadership to respective school staffs in systematic planning for improvement of their instructional program in an area of need identified by them. This program is currently being conducted with three inner city schools, an elementary school, a junior high school and a senior high school.

The programs are presently in various stages of implementation. It is too early for a very meaningful evaluation, but they appear to have considerable promise. Some schools are already involved in more than one program and find they complement one another well. Indications are that more than one may be taken concurrently, or they may be taken in any sequence with real payoff for the particpating system. Comprehensive evaluation reports on the programs will be available at a later date.

Edward P. Reimer

J. Brian Trump

	Consultant staff aids in this work. Action plans for implementation are finalized. Short-run work is again reassessed and modified if necessary.
Program is Implemented	Teams move ahead with organization improvement, program(s), using cross-system and/or staff consultants when needed. Short-term work continues.
Follow-up Workshop (3-5 days)	Teams come together for a workshop to assess projects, own learning, and future plans for continuing the management improvement team and its work. Time is also devoted to sharpening of skills in needed areas.

D. Resource Personnel

Dr. Jay Nisberg of Jay N. Nisberg and Associates and Dr. Ed Reimer and Mr. Brian Trump of the Winnipeg School Division will conduct the program. All will be available for program consultation between workshops.

E. Particpants

The total number of participants will be 20 to 24. These will be drawn from:

a) Superintendents assigned to Area 11 of the Winnipeg School Divisi No. 1.

b) All principals of Area 11 who decide to opt into the program.

c) A number of administrators from the rest of the Winnipeg system dependent on the number of positions remaining open.

F. Time

The program will begin in the fall term of 1976. It will continue through the remainder of 1976/77 school year and into the 1977/78 school year. The total elapsed time to complete the program would be approximately 12-18 months.

The training program will be conducted at appropriate times during the length of theproject. These will be conducted in workshop setti The total workshop time involved will be 19-23 days, of which half will be school division time and half will be personal time.

APPENDIX C: Survey Feedback-Action Planning Program (SFAPP)
(Appendices not included)

Interim Report

on the

Churchill Evaluation Project
(Winnipeg School Division #1)

Brian Trump
Winnipeg School Project
Director
September 30, 1977

A. Background - Churchill Project

Spring, 1972	-Churchill High School Staff decided to evaluate their school to find out if they were doing what they said they were doing in the area of programs and organization and to find out if they were meeting the expectations of their community.
1972-1975	-The staff through its project steering committee, developed school objectives, with staff and community input. The process was supported by the School Division through the Area 11 Superintendent.
1975-65	-At training programs in survey/feedback, action planning processes for internal organizational evaluation were set up. A number of schools and the Child Guidance Clinic participated in the training program. King Edward Elementary School agreed to act as a pilot school for the program at the elementary level, and Churchill at the secondary level. The program was designed and conducted by one external resource person and two internal consultants.
1976-77	-A modified training program was run for the elementary feeder schools for Churchill, the Mini-Area Administrative Council, composed of all the principals of the Churchill area, the Area Superintendent, and his assistant, and one other school outside the mini-area. One internal consultant conducted the training program and one member of the Churchill committee acted as a resource person.
	-A number of other schools and one mini-area are currently looking at the process and more than likely another training program will take place in the Division next fall.

Interorganizational Committee

1974-75	-A motion was passed at the annual Manitoba Association of School Trustees (M.A.S.T.) Convention that an evaluation procedure be set up in the Province to evaluate all schools and school systems.
	-An interorganizational committee was formed to follow through on the motion. The members of the committee included representatives from M.A.S.T., M.T.S.,

Department of Education, the Manitoba Association of School Superintendents (M.A.S.S.) and the Faculty of Education. This committee worked out an approach fo evaluation that was based on the princip of internal evaluation.

-The committee could find no-one who woul test this approach.

1975-76

-The committee contacted the Winnipeg School Division with the request that it might approach Churchill and use its model for internal evaluation. The key interest in the survey/feedback action planning approach was the internal develo ment of instrumentation, the action follo up that takes place, the potential to assess organizational and program processes and content, and the possibilit of involving the community and students.

-Committee representatives met with the Churchill High Steering Committee. They agreed to share their process and experienc with the Interorganizational Committee in exchange for funding.

-The School Board passed a motion re: Participation in an Evaluation Pilot Project (attached).

-An Advisory Committee was established for the expansion of the project in the Winnip System. This committee at this time is composed of M. Baragar (School Board), B. Chappell (Churchill Project), L. Fleish (Superintendent's Department), N. Phillips (W.T.A.) E. Reimer (Consultant) B. Trump (Project Director.)

1976-77

-Midland School Division in rural Manitoba is also using an internal evaluation approach. The training components are the same as those developed through the Churchill Project experience.

-The Interorganizational Committee is supporting the internal evaluation model as an alternative for evaluating school systems. This is based on the interim reports from myself as the Winnipeg Projec Director and R. Loeppky as the Midland Project Director. The committee also feels the process should be expanded.

B. Intent of the Project

The background of the Churchill Evaluation Project originated in Churchill High School in the late 1960's. These were years of change in education and Churchill High School adjusted and accepted change in relation to identified needs. Basic to the approach to change was the desire to shift to an administrative approach that identified and used staff strengths in the decision making process of the school. Committees were formed to deal with and implement appropriate changes related to such topics as: student evaluation, new approaches to teaching, such as team teaching, and decentralization. Many changes seemed to be precipitated by the fact that students coming into Grade 7 were at many different levels in their development. The question then arose as to how the school could evaluate the changes. This originated with a desire to evaluate student progress but soon progressed to a desire to evaluate school programs, objectives and operation.

Churchill High School sought assistance via the Department of Education Demonstration Project Grants but was turned down. Churchill decided to continue on its own with support from the Area Superintendent. The school organized a program for establishing objectives and wished to evaluate how it was functioning as an educational organization in the total system and in the community it served. As a result the Project Steering Committee, through its coordinator, approached the Organizational Development Consultant and the Program Development Consultant in the Area about the possibility of an on-going Organization Development Program focussing on evaluation.

It was decided that an Action Research approach was the most appropriate Organization Development Program. Since Churchill was already considering a Survey Feedback approach, this became the basic model. Jay Nisberg was contacted as a resource person and he and the two internal consultants, Brian Trump and Ed Reimer, designed and conducted a training program. A number of systems decided to join Churchill in the Survey Feedback Training Program. Of these organizations, Churchill, King Edward, and the Child Guidance Clinic followed through with the full evaluation program and all but one conducted a partial survey.

The objective of the process is as follows:

General Objective:

To provide a process by which a school or school system can systematically identify and evaluate its program and organizational needs and to develop action plans to meet these needs.

Specific Objectives:

1. To evaluate the organizational health of the system.
2. To improve organizational and program performance by encouraging the development of programs to meet organizational and program needs.
3. To increase the effectiveness of the system's problem solving ability.
4. To improve interpersonal working relationships.
5. To promote the development and use of leadership potential among staff

C. Project Components

The evaluation model that is currently being used in the project is one that Ed Reimer and I have developed and modified from our own experience over the last five years. However, we have drawn quite heavily from the survey-feedback research and experience of Rensis Likert and Jay Nisberg while they were with the Michigan Institute of Social Researc and the General Motors Institute, respectively. They developed their approaches while working with the Michigan School Systems and General Motors Corporation.

The key concepts underlying the process are those of:

- -Organizational Health
- -Organizational Development
- -Survey Feedback Design and Administration
- -Building Trust Climates
- -Program and Organizational Problem Solving and Action Planning
- -Organization Intervention and Change

D. Results of the Project

This section is incomplete in that some additional data is yet to be collected from some of the Churchill Mini-Area Schools. As it is, some of the data collection will not be completed by December, 1977, for the final report. However, more information will be available than is now the case.

The data collected to assess success or failure of the project are divided into the following:

1. Data from King Edward School (Sept. 1975 - June 1977)
2. Data from Churchill High School
3. Data from Representatives of other participating schools.
4. Personal Evaluation

1. King Edward School

The agreement with King Edward School was that the school staff would share as much information as possible related to the project and its outcomes. Their report is found in Appendix C.

The key indicators of success that King Edward used are:

a) Teacher absenteeism
b) Teacher turn-over
c) Pupil academic achievement
d) Pupil satisfaction with class and teacher
e) Pupil absenteeism
f) Substitute attitudes

In addition, King Edward is comparing the results from the two surveys, plus the results of the various action plans.

a) Teacher Absenteeism

The time lost due to short term illness decreased an average of 2.75 days per month. This is a 14% reduction or $1,180 dollars saved a year for substitute costs related to illness.

b) Teacher Turn-Over

Excluding class closures and pregnancies, the staff turn-over at King Edward has been:

Pre-Survey 1973-1974 staff to 1974-1975 staff - 4 chang
1974-1975 staff to 1975-1976 staff - 10 char

Survey begins 1975-1976 staff to 1976-1977 staff - 0 c
1976-1977 staff to 1977-1978 staff - 0 cha

There has been no staff changes for reason of transfer at King Edward since survey-feedback has been started.

c) Pupil Academic Achievement

While there is a gain in the results of the standardized tests administered in 1976 and again in 1977, it does not appear to be a significant gain. Overall there was a gain in 11 categories and a decline in 4 categories. The King Edward report indicates that the overall average increase in scores, though not significant, is due to better program planning.

d) Pupil Satisfaction with Class and Teacher

The information from classroom surveys has been retained by the teachers. The surveys used by the staff are in Appendix D.

e) Pupil Absenteeism

The report does not contain figures of absenteeism prior to the first survey year. However, there is no significant difference in pupil absenteeism for the period Sept. to Dec. in 1976 to the same period in 1975. The figures are:

	1975	1976
September	92.5%	92.4%
October	91.3%	92.0%
November	89.6%	89.6%
December	91.6%	91.7%

f) Substitute Attitudes

There is no data available at this time.

Results of Survey 1976/1977

The following is the responses to the survey at King Edward during 1976 and 1977:

2. Churchill High School

The agreement with Churchill High School and the Interorganizational Evaluation Subcommittee chaired by Roy White was that the school would share its developmental process of evaluation in exchange for funding. (This same agreement was subsequently made between myself as project director and the Churchill Mini-Area Schools.) Churchill's report includes the following information:

a) Attitude of the Staff to the Project

b) Process Description

(The complete report is found in Appendix E.)

a) Attitude of the Staff to the Project

The conclusions, comments, and recommendations of the Churchill Evaluation Committee are as follows:

Conclusions, Comments and Recommendations

It would appear that about one third of the staff has an attitude of acceptance toward the project. A slightly smaller number appears to have an attitude of rejection. The remainder, approximately one third, reveal an attitude of non-commitment.

Positive responses seem to come from teachers who find the process to be an influence in the organization of the school particularly departments, and a stimulus to professional growth.

Negative responses seem to come from teachers who look for concrete, measurable change and do not see it.

The large number of respondents who are not sure may, in addition to the reasons suggested on page one, also reflect the lack of specific objectives of the project. As a staff we have not decided what measurable changes we want.

There seems to be need for some further work group leader training. (one half day last September proved very helpful.)

There is a strong desire to see action as a result of discussion. A review of the comments suggests that people want that action to be taken by someone else.

There seems to be a need to change the timing and length and the work group meetings that deal with feedback and action planning.

There is some perception that the desired organizational changes require attitudinal changes.

b) Process Description

The process followed by Churchill HIgh School is essentially the same as that shown by the model previously. The four key stages of the process are:

i) Determing what information is needed;
ii) Gathering the information (Survey);
iii) Interpretation of information (Feedback);
iv) Planning action for change.

The detailed description of these stages as found in Appendix E and the survey is found with the other surve in Appendix G.

3. Data from Representatives of Other Participating Schools

The following information was obtained from the school representatives in the training program 1976-1977. The list of representatives are found in Appendix F. The information which was collected in June, 1977, is divided into two sections.

a) Participants Attitude to Project and Training
b) Initial Results of Project.

a) Participants' Attitude to Project and Training

b) Initial Results of Project

All schools have entered the initial planning stages. Some have already begun to implement some plans. The next steps and results of these steps will be gathered from the schools for the report in December.

The initial indications are that three of the schools and the administration group found the process useful and are moving on action plans immediately. Two other schools are having mixed results in that some groups in the schools are initiating actions already, while other groups in the school are not. The last school was already working on a major project and the Survey Feedback indicated the staff was already working on the major area of concern.

The desceiption of the process in each school and any results that are available will be in the next report.

4. Personal Evaluation

It is difficult to be objective in my evaluation of the success in that I have been so closely involved in developing and delivering the program. Nevertheless, I feel I can contribute some useful information as I have acted as an external consultant, as well as a trainer, to the various schools and administrative groups. Also, my knowledge of the procedures and underlying theory and concepts places me in a unique position in viewing the results of the project.

In my estimation, the internal evaluation process has much to recommend it. There are weaknesses, to be sure. However, some are and can be corrected as we gain experience in the process. On the other hand, there are costs as well as benefits in any change process and some of these cannot be altered.

The key strengths in the process as indicated by the results in the participating schools are:

a) Concrete action plans are developed and implemented by the staff in the school in high priority areas defined by the staff.

b) Commitment of people to the educational and organizational processes in the school is strengthened. This appears to be due to increased participation of the staff in these areas. It is especially evident in the schools in which tangible results of action planning are evident.

c) People have a better understanding of what their job is in the school, what they are trying to accomplish, to whom, and for what they are accountable, and how they interrelate with others. This is indicated by the staffs who are now involved in establishing goals and personal and program evaluation processes.

d) People are involved in more decision making activities. Also the decisions are more appropriate in that those decisions that involve others are identified and decided upon elsewhere than in small work groups. This varies depending on the size of the school and how the school made decisions in the past.

e) People tend to receive more consistent immediate feedback on their performance. Administrators receive this through the structure of the survey. It appears that people generally receive this feedback during their action plann An interesting result is that staff in some schools are demanding performance feedback from their principal. This also indicates the interest in personnel performance evaluation systems.

Areas that need to be attended to, in order to strengthen the evaluation process are:

a) Administration needs to be more involved in the process. The initial orientation or launch stage should really take longer and the administrators should be more informe of the theory and concepts and how they are to be involve in the process. As people indicated previously, if the boss isn't committed and involved, it isn't going to go.

b) Concrete plans need to be acted on quickly. If they are not, people begin to feel that nothing is happening. Changes need to be documented as well.

c) External consultants need to work with internal people and shove responsibility on to them and their staffs. However, it is useful if the external consultant works closely with the staffs. The schools which experienced most success spent some planning time with me.

d) More emphasis needs to be placed on leadership training for internal leaders in the school. This is especially evident in schools where different levels of formal leadership exists (e.g. vice-principals, department heads team leaders.)

The areas that cannot be changed are:

a) The length of time needed to begin action planning and implementation is excessive. However, the time is necessary to establish a system that is renewable on an annual basis. Also, major changes take time, and it is useful for people to understand the reasons for and the steps involved in a change.

b) Another concern is that the process may appear to be elaborate and structured. "Using a baseball bat to kill a fly," as someone said. However, short circuiting the process seems to result in superficial, short term changes. This was shown in those schools which have been involved in a shortened form of the process or who have bastardized it on their own.

c) Initially the external consultant needs to be knowledgeable and skilled in functioning as a change agent and process consultant.

These observations are my own impressions but they are drawn from and supported by the comments a-d data collected from the participating schools.

SURVEY-FEEDBACK ACTION PLANNING MODEL

1. Launch Process and Decision - Acquaint administration and key personnel with process and its implications. Decision made to go ahead or not.

2. Internal Consultant Assigned - Selecting internal representatives who will receive the training and guide their staffs through the process.

3. Contract with Outside Consultant - Mutual agreement as to the role to be played by the external consultant/trainer.

4. Orientation - Representatives acquaint staffs with program.

5. Survey Administered - Surveys are designed and administered to staffs.

6. Work Group Leader Preparation - Leaders of the work groups are prepared to help their people move through a problem solving process.

7. Performance Measures are Established - Indicators of success and failure of the process are established.

8. Feedback-Survey results are returned to the appropriate work groups.

9. Work Group Action Meetings - Each work group (e.g. department) identifies areas of concern and develops action plans for improvement.

10. Interim Survey - Possible small sample of respondents fill out the survey after a period of months as a check.

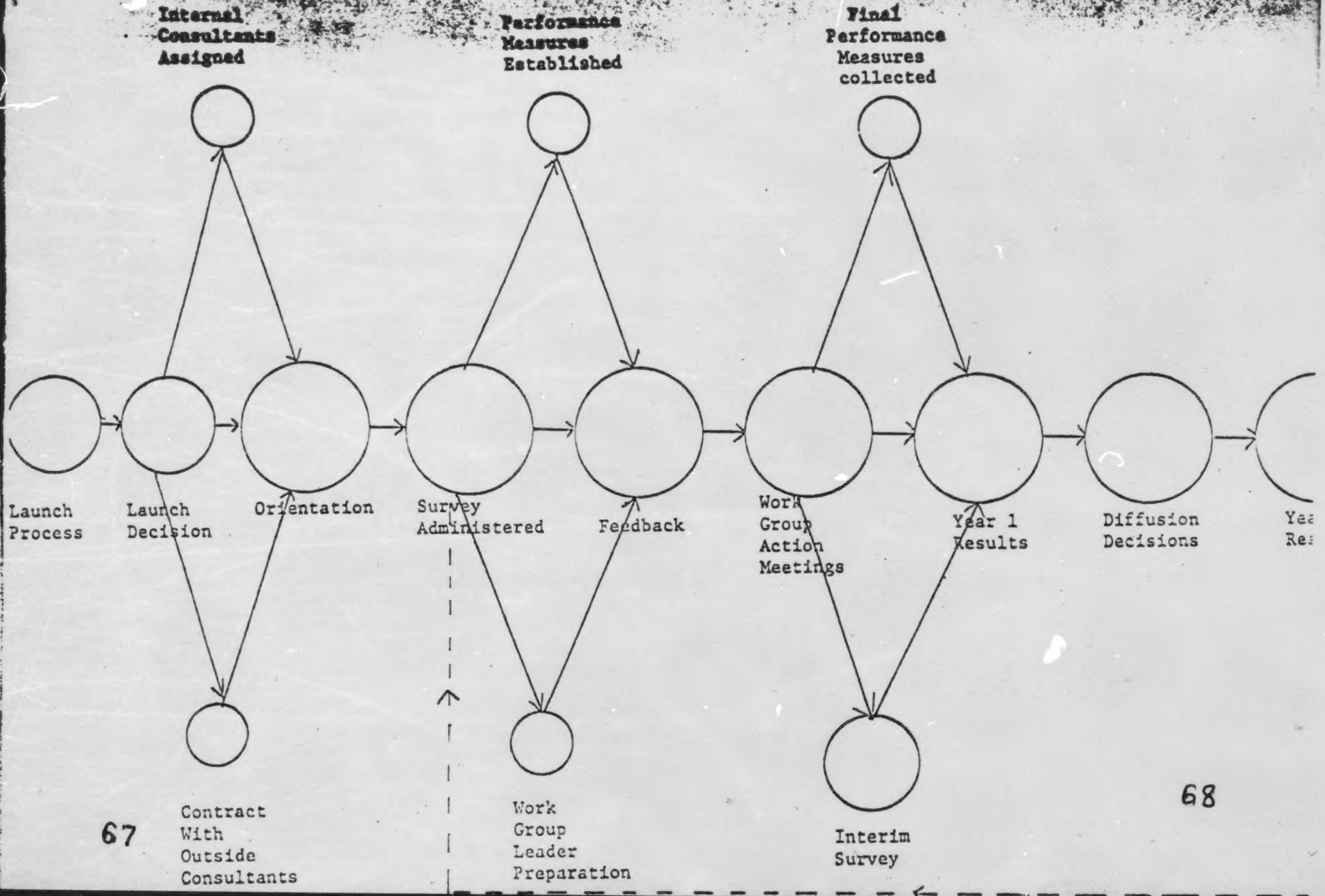
11. Final Performance Measures Collected - Collection of data which indicates success and failure. (Approximately 1 year from the beginning of program.)

12. Year 1 Results - Report on results of action planning and indicators of improvement.

13. Diffusion Decisions - Decisions necessary to continue the self-renewing process of the organization.

14. Year 11 Resurvey - Conducting second survey to evaluate changes and to initiate future action planning.

SURVEY-FEEDBACK ACTION PLANNING MODEL


Internal Consultants Assigned
Performance Measures Established
Final Performance Measures collected
Launch Process
Launch Decision
Orientation
Survey Administered
Feedback
Work Group Action Meetings
Year 1 Results
Diffusion Decisions
Yea
Re
Contract With Outside Consultants
Work Group Leader Preparation
Interim Survey

SURVEY FEEDBACK ACTION PLANNING EVALUATION

June 20, 1977

1. Rate each of the Stages in the program with respect to its usefulness (a) to your organization and (b) to your own learning.

	Usefulness to School Project						Usefulness to Own Learning					
	1	2	3	4	5		1	2	3	4	5	
a) Orientation				9	1	(4.1)			2	4	4	(4.2)
b) Survey design			1	3	5	(4.0)			2	3	5	(4.3)
c) Survey Administration			4	3	3	(3.9)		2		3	5	(4.1)
d) Feedback and Work Group Preparation				6	3	(4.3)				2	6	(4.8)
e) Evaluation		1	1	6	2	(3.9)		1	3	4	2	(3.7)
f) Diffusion and Organizational Renewal			3	7		(3.7)		2	1	6	1	(3.6)

2. To what extent did the program achieve each of its stated objectives?

	1	2	3	4	5	
General objectives: to provide a process by which an organization can systematically identify its process and product needs and to develop action plans to meet these needs.				5	5	(4.5)
Specific Objectives:						
1. To evaluate the organizational health of the sytem				4	6	(4.7)
2. To improve organizational performance by encouraging the development of programs to meet organizational needs			5	2	3	(3.8)
3. To increase the effectiveness of the organization's problem solving ability		1	1	5	3	(4.0)
4. To improve interpersonal working relationships			3	5	2	(3.9)
5. To promote the use and development of leadership potential among staff			1	6	3	(4.2)

	1	2	3	4	5	
3. Usefulness of information given in training sessions				5	5	(4.5)

- -work group preparation was especially useful
- -first two or three sessions in particular were stimulating, thought provoking, and an education. Intensiveness and extensiveness of material was exhausting.
- -I really enjoyed the training sessions, everything I learned was useful.

	1	2	3	4	5	
4. Effectiveness of format in training sessions				5	5	(4.5)

- -it was clear and very effective
- -sessions well organized - a plan to follow which was followed. Good mixture of information, giving and sharing of groups resources.

	1	2	3	4	5	
5. Usefulness of handouts -I didn't take the time to read all of them. -Handouts were useful, but I didn't always schedule a time for reading them. -Many handouts were full of terminology or jargon which was strange to me. -Informative and furthered education of participants. -very useful			2	5	3	(4.1)
6. Effectiveness of consultant(s) to your group(s). -the time the consultant spent with the staff representatives and the administration was very helpful to me. It helped me transfer responsibility of the project. -excellent -great! -consultants thoroughly know the material - easy relationship with group and masters of good interpersonal relationships				2	7	(4.8)
7. Improved functioning of your project team -Second time through really helped to reinforce ideas -I thought that we improved a great deal in working together. Ideas shared were valuable.			1	5	3	(4.2)
8. Appropriateness of provision for interaction with other groups -helpful - was able to incormporate some ideas when working with my own school group -each session began with groups reporting as to what had occurred in their particular school -feedback and sharing sessions clarified issues and problems. The shared knowledge acted as a cohesive quality of the group experience. Sufficient provision was made for this interaction. -group sharing			1	7	2	(4.1)
9. General satisfaction with the program. -I don't feel that the program was very successful in our school this year, therefore I would tend to rate it -3. Hopefully, next year the success will increase. -program was excellent - I count it a privilege to have taken part.			1	5	4	(4.3)
10. How strongly would you recommend to other organizations that they participate in such a program? -I feel strongly that all teachers should at least become acquainted with this program, even if they don't participate in it.			1	2	7	(4.6)

Comments: Please comment briefly on each of the following:

11. List the things you found most helpful about the program:
    - listening to the small school problems
    - following models and examples of schools which had participated in the program.
    - actual preparation at the inservices, e.g. survey.
    - I found all the sessions very useful, informative, and well conducted. The skills I learned from the sessions I was able to apply quite successfully when working with my staff. The session on survey preparation (design) administration I found extremely worthwhile.
    - Learning from Churchill and King Edward examples.
    - survey design
    - administering the survey and analyzing the data.
    - how to be more effective in solving problems as a group.
    - getting time during the inservices to get the necessary work done.
    - having survey models from other schools.
    - it was well planned and it indicated to me the intention of the entire program.
    - if I was confused there was adequate opportunity to ask questions.
    - the activity on Arctic Survival was revealing
    - the information obtained from Churchill's first experience helped.
    - systematic way of tackling problems.
    - definite action plans result
    - this is a process which can be applied to almost any situation.
    - specific ideas given and help available
    - survey design
    - ideas were specific for keeping work group on topic
    - working in groups
    - supportiveness of consultants
    - interaction of group - learning more of group dynamics
    - input of Churchill High
    - I found the program helpful, it made me a stronger person, and improved so many areas - job, outlook, school

12. List the things you found least helpful about the program:
    - some of the theory
    - handouts were not very useful because I didn't take time to read many of them.
    - handouts could have been used more successfully had they been handed out prior to each session.
    - difficult to get enough staff together to accomplish some of the tasks.
    - that administration wasn't involved more intensely (for taking some leadership role).
    - I sometimes found it difficult to explain to the staff what was happening part way through the program.
    - Administration not sufficiently involved or informed.

13. On the basis of your experience, what staff conditions are necessary for participation to be successful?
    - boss has to be actively committed
    - work group leaders must be actively committed
    - both boss and work group leaders need specific training
    - participant observer - someone other than leader (where possible) with specific training in role.
    - open mindedness to the project
    - total perspective of the program e.g. time line, time commitment
    - administration must be supportive
    - having an administration who is supportive and open is extremely important and necessary.
    - an openness on the part of most individual staff members is another prerequisite.
    - built in time for problem solving work groups - as part of regular school time
    - a more positive feeling from staff members, and more support from the administration.
    - time to work out problems
    - willingness to give up some school time. and to work extra at times after school
    - cooperation and a willingness to share in school concerns.
    - consensus to participate before knowing all the details
    - must be willing to meet to work on problem solving
    - a willingness to cooperate and work together
    - a willingness to devote some time
    - administration must be supportive.
    - positive support from administration needs to be greater
    - time for participation needs to be made available during school hours.
    - people who are open-minded
    - trust within the staff members
    - genuine desire to improve conditions
    - strong commitment
    - staff to feel a need
    - staff to have some commitment
    - orientation as to what it is all about
    - administration must be committed

IMPLEMENTATION OF THE PROJECT DESIGN

Nov, 15/75	1. Development of a list of educational goals for the school. The list reflects the input of teachers, parents and students.
	2. Training for the project committee members: (approx.1
Oct. 29,30	a) Orientation to process of survey-feedback
Dec. /75	b) How to prepare and administer the survey
Jan. /76	c) Facilitator training for the process of using the feedback from the survey
Feb. to Mar./76	d) Training for the action planning process e) Training in monitoring and evaluating the project.
	3. Staff orientation:
	a) Overview of project design and implementation plan
	b) Orientation to the specific survey-feedback proces
Dec. 2/75	4. Staff input re: the content of the survey
Jan./76	5. Survey is administered
Jan./76	6. Orientation and preparation of staff work group leade for ways of using and dealing with the survey data.
Feb./76	7. Review and intepretation of feedback from the survey by the staff.
March, April, May, 1976	8. Work group action meetings, based on data and plannin by work groups. (A work group is a group of staff members with an immediate superior or a recognized head. Thus, the whole staff may be a work group; all the teachers together may be a work group; a specific department may be a work group; etc.)
June /76	9. Re-survey of staff vis a vis the process of the educational service.
Next Year	10. Re-survey

The process of the project is a cyclical one.

Training Program

This is an intensive program to train representatives from the schools or school system to facilitate the Survey-Feedback Action Planning process. The training program consists of a series of workshops and consultations to give the internal representatives the conceptual and operational understanding of the process necessary to apply it successfully to their system.

The workshop topics are:

1. Orientation
2. Survey Design
3. Survey Orientation
4. Feedback and Work Group Leader Preparation
5. Evaluation of Intervention
6. Diffusion and Organizational Renewal

(The outline of each workshop will be included in the final report.)

The workshops are conducted over a period of months in conjunction with the time line of the project. The amount of workshop and consultation time is approximately ten days in total though this may vary with the needs of an individual project.

A sample time line for the first year of the project in Churchill High School is found in Appendix A

The participants who took part in the two years of the project are found in Appendix B.

School Action Plans

The staff were involved in a number of key activities that we the result of the survey-feedback process. Some of these activiti were:

(i) The total staff were involved in a school curriculum development program during 1976-1977.

(ii) Most of the staff is continuing to implement an attitude and behavior improvement program for students based on a modified behavioral modifaction behavioral objectives format.

(iii) The office group has conducted a time management stud and improved the efficiency of the office. This grou has also increased information availability to all associated with the school.

(iv) Detailed plans, activities and workshops related to the program are outlined in the King Edward Report, Appendix C, The objective of the process is as follows:

General Objective

To provide a process by which a school or school system can systematically identify and evaluate its program and organizational needs and to develop action plans to meet these needs.

Specific Objectives

1. To evaluate the organizational health of the system.
2. To improve organizational and program performance by encouraging the development of programs to meet organizational and program needs.
3. To increase the effectiveness of the system's problem solving ability.
4. To improve interpersonal working relationships.
5. To promote the development and use of leadership potential among staff.

The following report is a brief outline of the status of the Churchill Evaluation Project (Winnipeg School Division #1) as of September, 1977. A final report will be presented on the projects and its results in June, 1978.

The report is divided into five parts. These are:

A. Background of the Project
B. Intent of the Project
C. Project Components
D. Results of the Project
E. Future Directions
F. Appendix

The information will be given in brief form with a minimum amount of explanation. The intent is that the readers of this document have some prior background of the project or that they have received some orientation through personal contact with those involved. If additional information is needed, please contact:

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ADMINISTRATIVE DEVELOPMENT AND ORGANIZATION IMPROVEMENT PROGRAM FOR THE WINNIPEG SCHOOL SYSTEM

A. Rationale

While there is no shortage of good ideas and programs for schools, administrators frequently encounter difficulty in getting their ideas and policies implemented. Personal and organizational resistance to change all too often serve to sabotage even the best ideas and policies. In many cases the problem rests not with any weakness in the ideas but more with faulty implementation strategies. In particular, not enough attention is devoted to a careful diagnosis of the "informal" elements within the organization which can serve to work against the improvement. More thorough and systematic diagnosis and strategy planning can often reduce or eliminate resistance, and can, in many instances, generate approaches which increase support for organizational improvement efforts.

The proposed program will focus on how to implement and follow through on long lasting leadership and organizational improvement strategies. The emphasis will be on gaining acceptance, ownership, and commitment throughout the School Division for continued organizational improvement efforts. Within this broader framework, specific leadership and improvement techniques will be examined and taught.

In essence, the program is designed to provide ongoing, inservice training and development of leadership teams along with consultative support for organizational improvement efforts. There will be a combination of workshop training sessions, back-home applications, follow-ups, and evaluations.

B. Objectives

The objectives of the program are to help the Division improve the organizational functioning in its school system. The program will be available to superintendents and principals in Area 11 of the Winnipeg School Division. The major steps will be:

1. The development of small leadership improvement teams composed of superintendents and principals. These teams will be involved in planning and implementing organizational improvement strategies in their schools and in the Area.
2. The creation of an ongoing cross-system consultation process in which teams from one group or mini-area can be utilized by teams from another group or mini-area to provide additional help in planning and implementing organizational improvement efforts.

3. The training of individual team members and the teams as a whole in the application of new leadership techniques and applied behavioral science knowledge within the school system. The focus will be on increasing leadership skills in problem-solving supervision, decision making, assessment of personnel, conflict management, etc.

4. The further development of team members as leaders. Emphasis will be on self-assessment of leadership assumptions and styles, with an eye towards self-improvement.

C. Program Description

Critical Event	Brief Description
Overview Preview (1 day)	An introduction and overview during which participants are exposed to all aspects of the project in microcosm. Part of the time would be spent in an exploration of the "fit" between their own organizational needs and the objectives of the program. Both the costs and benefits of participatio would be examined.
Selection of Management Teams (back "home")	Those principals deciding to participate would choose a small group of colleagues to work with them (about 3 other people) in their own schools.
Start-Up Workshop (3-5 days)	A workshop focusing upon: 1) Development of the administrative team as a working unit. 2) Examiniation of and practice with new applied behavioral science and leadership concepts. 3) Identification of leadership improvement targets for coming year. 4) Self-assessment of own leadership approaches and styles 5) Initial planning for organization improvement. 6) Start-up of cross-system consultative function.
Organization Diagnosis (3 days)	Workshop with primary focus on conducting diagnoses as a first step in leadership development and organization improvement. Attention will be devoted to skill development in conducting different kinds of

	diagnosis: team diagnosis, inter-group diagnosis, inter-personal diagnosis. Teams will use back-home concerns as the vehicle for skill development. A concurrent focus will be upon further development of cross-system consultation. Finally, short-run action plans will be developed.
Diagnosis (Back"home")	Teams will return to their schools and carry out diagnostic plans. They will use cross-system consultation when desired, as well as the services of the program staff. At the same time, they will begin to operationalize leadership approaches learned during the workshop.
Organizational Improvement Strategy Planning (3 days)	Workshop has two main foci: 1) Teams summarize diagnostic findings. Consultant staff gives input and assistance on planning alternative strategies for improving organizational functioning. Plans are made for building the necessary involvement and commitment within the system. 2) Focus upon assessment of work up to present, analysis of successes and failures of short-term steps already taken.
Selection of Improvement Strategies (3 days)	Consultant staff presents input on the range of leadership-and-behavioral science tools available for achieving different goals set by teams. Teams explore techniques, examine issues such as the necessary conditions for a particular strategy to work. Practice at using techniques effectively. Both short and long run plans are made, and current efforts are re-assessed and modified. Cross-system consultation continues.
Back "Home" Work	Teams continue to implement short-run strategies and plan to implement long-run strategies.
Evaluation Plans (3 days)	Workshop in which means for evaluating success or failure of organizational improvement plans are explored. Each team develops a set of criteria and methods for evaluating their project.

June 30, 1977

REPORT ON THE WINNIPEG CURRICULUM DEVELOPMENT CATALYST PROGRAM

Edward P. Reimer

I. Introduction

A. Rationale

In recent years there has been an increasing emphasis on decentralization of curriculum development. The Provincial Department of Education is providing less prescriptive guides for instructional programs than it used to. School staffs and individual teachers are expected to develop and/or modify curricula for their students. This trend has run parallel with growing expectations that teachers respond to the different needs of individual students and small groups of students by providing individualized and alternative programs.

Two frequent reactions by teachers to these expectations are that the system is not providing adequate support in terms of time, resources and leadership, and that they lack the specialized training to develop their own curricula.

This program was based on the premise that there are unused skills for curriculum development and potential for leadership in curriculum development among teachers in the Winnipeg School System, and that a key to fuller use of these resources is organizational support.

Hence the program was designed essentially as a support system to promote effective curriculum development activities among teachers by encouraging them to use existing skills, and to help them build on and refine existing skills related to curriculum development and leadership by practice and training.

The design of the program draws from (1) Havilock's work on planned change,(2) research on the dissemination of innovations by Everet Rogers, (3) a model for integrating inservice education and curriculum development designed by Robert Westbury, and (4) Keith Berry's catalyst program for educational change.

B. Objectives

Stated objectives of the program were as follows:

General Objectives: To provide support to staffs who want to initiate a curriculum development project.

Specific Objectives:

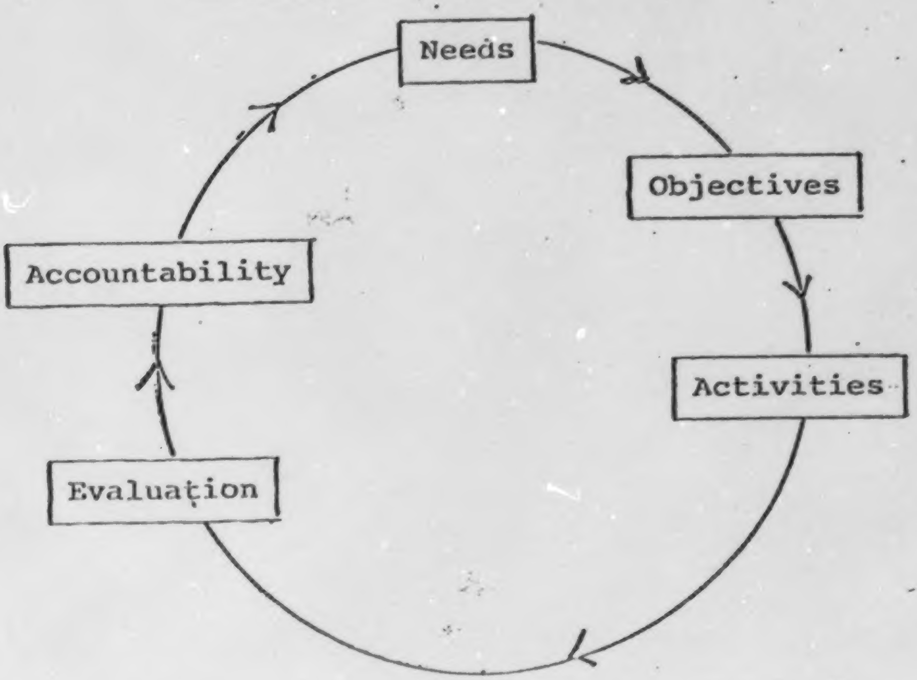
1. To encourage the development of programs at the school level in response to student needs.
2. To promote the use and development of leadership potential among teachers.

3. To provide supportive links between schools engaged in curriculum development for reciprocal learning.
4. To facilitate use of resource services available in the school division.
5. To initiate processes and provide skills in schools for effective ongoing curriculum improvement.

C. Program Description

School staffs who chose to participate in this program identified a curriculum project they wished to work on. They then select two or three teachers from their staff to serve as catalysts. These catalysts participated in a curriculum development training program and provided leadership to the staff in a step-by-step process of planning their curriculum project. Catalysts received training in a sequence of workshops over a period of about five months. They learned the skills involved in each of the processes depicted in the curriculum development model given below, and then applied these processes to their staff project. To facilitate this task they were also introduced to some concepts and skills in the theory of planned change, leadership, task group process, interpersonal communicatio and consultation.

Curriculum Development Model



The catalytic process was conducted in five stages: (1) Orientation (2) Identifying Needs (3) Stating Objectives (4) Planning Activities and (5) Evaluation/Accountability. Each stage consisted of three steps: (1) a catalyst training session, (2) a feedback/problem solving/planning session and (3) on site application to the school project. Orientation for the Catalyst teams consisted of a three day seminar. The two sessions for each of the other four stages were conducted as ½ day workshops at two week intervals, to allow time for on site planning and activities between sessions.

D. Start-Up Procedures

1. On May 17 and 18, 1976, Dr. Robert Westbury conducted a Workshop on a Model which integrated Curriculum Development and Inservice Education, developed by him and used with a number of schools in Edmonton. A number of teachers, consultants and administrators from all three areas were in attendance. The general consensus of those in attendance was that follow-up activities should be conducted to introduce procedures used by Dr. Westbury to school staffs.

2. On June 29, 1976, a proposal for a Curriculum Development Catalyst Program was presented to Mr. J. K. Cooper, Area 11 Superintendent. Authorization for implementation of the program was received from Mr. Cooper on July 23, 1976. Mr. Cooper indicated in his letter that Area 1 and 111 be invited to participate in the program.

3. At a meeting with the Superintendents on September 2, 1976, Areas 1 and 111 were invited to participate in the program.

4. In October the program was explained to principals at the three Area Council Meetings.

5. During late October and early November the program was explained to a number of school staffs by invitation of interested principals. November 10 was set as the deadline for staffs to opt into the program.

E. Participants

Three schools participated in the program: one elementary school, one junior high school, and one senior high school. A list follows of the (1) participating schools (2) projects (3) catalyst teams and consultants. (Each staff was encouraged to identify a consultant with competence related to their project to work with their team.)

	School	Project	Lead Teachers	Resource Consultant
1.	King Edward	Student Behavior	Terry Braun Wayne McMahon	ERic Alper
2.	King Edward Primary Group	Open Area Planning	Olga Andrewjczuk	Janet Redgwel
3.	Isaac Newton	Individualizing Instruction	Ray Mohammed Mary Gorvie Doug McLean Harry Maharaj	Zain Mohammed (internal) Arnold Popesk (external)
4.	Elmwood	School Organization	Stewart Black Peggy Prendergast Chris Pammenter	

F. Program Evaluation

Three methods were used to evaluate the program:

1. A progress evaluation was conducted half way through the program by having participants complete an open ended form.
2. Participants completed two evaluation instruments during the final session: (1) The Area 11 Consultants Evaluation Form and (2) A special comprehensive evaluation form designed to assess all aspects of the program.
3. Data from individual school projects included in school project reports.

11. Training Program for Catalysts

The following is a brief outline of the workshops conducted with the catalyst teams.

A. Orientation - November 24 and December 2 and 3, 1976

Objectives

1. To apply the general planning model and concepts of systems change to a typical school situation.
2. To apply leadership skills in a task situation.
3. To plan procedures for effective staff orientation to the projec
4. To begin building teams into effective work groups.

Program Description

The design of this seminar integrated the three themes, curriculum development, leadership and team building. In their school teams participants used a case study to work through the first three steps of the planning model. This task was interspersed by theory input and group activities related to leadership styles, motivation, communication skills, task group processes, change theory and consulting skills. In this introductory session as well as the subsequent half day training session for each stage in the planning model there was a heavy emphasis on theory input.

B. Needs Assessment Training Session - December 13, 1976. P.M.

Objective - to develop a plan for getting teachers to identify the needs of their students.

Program Description

Each team reported on activities to date and plans for staff orientation. Theory input on Needs Assessment was given on the following topics:

1. Assumptions and Parameters
2. Factors that help identify student needs
3. Sources of Information
4. Methods of getting data
5. How to use Needs Data

Teams spent considerable time on planning. They were assigned the task of developing a plan (1) for assessing the needs of their own students and (2) for getting other teachers involved in assessing needs of their students. Suggested steps for their tasks were:

1. Consider relevant need factors
2. Consider staff needs
3. Consider potential blocks and constraints
4. Set specific objectives related to staff needs to guide you in your planning
5. Develop specific action plans

C. Needs Assessment - Feedback/Planning Session - January 5, 1977 P.M.

Some time was spent on status reports and discussion of problems of school projects. Teams spent most of the time on further planning for staff needs assessment. Resources and needs in the group related to objectives were discussed as a basis for planning the next session.

D. Objectives Training Session - January 19, 1977 P.M.

1. To learn how to write learning objectives appropriate to identified student needs.

2. To begin planning for getting respective school staffs involved in writing effective student learning objectives.

Program Description

1. Requirements for project logs to be used as a basis for project reports were outlined.

2. Theory Input on Objectives:
    1) Criteria
    2) Behavioral Objectives
    3) Teaching Objectives
    4) Content Analysis and Objectives
    5) Levels of Objectives
    6) Writing Objectives in the affective domain
    7) Systems Objectives

3. Wayne McMahon outlined procedures used at King Edward last year for developing objectives.

4. Assigned Group Task:
    1) Write a set of student learning objectives based on needs profiles.
    2) Using the basic planning model develop a plan to get staff to write student learning objectives.

E. Objectives Feedback Session - February 2, 1977 P.M.

After a progress report in which teams explained activities conducted, project status and planned directions, teams spent most of the afternoon working on school project planning with the assistance of consultants.

F. Activities Training Session - March 2, 1977, P.M.

Objectives

1. To learn concepts and processes for systematic planning of learning activities.
2. To begin planning an appropriate program on learning activities for respective staffs.

Program Description

1. A formal progress evaluation of the Catalyst Program was conducted.
2. Theory input on "Planning Learning Activities" covered the following topics:
    1) Selecting General Strategies
    2) Selecting Learning Activities
    3) Organizing Learning Activities
    4) Selecting Learning Resources
    5) Evaluating Learning Activities

3. Teams were given time to begin:
    1) Assessing current staff needs related to the above processes for planning learning activities, and
    2) begin planning an appropriate program on learning activities for respective staffs.

G. Activities Planning Sessions - March 16 and April 6, 1977 P.M.

By this time the individual school projects were at very different stages, generally behind the training program. Also, the teams needed more time to plan for their staff program in activities. In response two afternoon sessions were given almost totally to team planning with the assistance of the consultants.

H. Evaluation Training Session - April 20, 1977, P.M.

Objectives

1. To understand principles and procedures for developing an evaluation plan.

2. To learn how to use a systematic procedure to build an evaluation plan.

Program Description

1. Theory input covered rationale, basic principals, criteria, indicators and strategies for evaluation.

2. Teams selected one or more objectives from their school projects and developed a plan to evaluate the achievement of these objectives using a structure process model provided.

I. Evaluation Planning Session, May 4, 1977, P.M.

Objectives

1. To plan for the evaluation of school projects.

2. To begin planning for presenting evaluation concepts and processes to respective staffs.

Program Description

1. Input on the expectations of the Program Director and the Administration re evaluation of school projects.

2. 1) Using the process model presented in the previous session as a guide, catalyst teams planned for the evaluation of respective school projects, and
   2) began planning a program to convey evaluation concepts and processes to respective staffs.

J. Accountability and Wrap-Up Session - May 18, 1977 P.M.

Objectives

1. To plan for school project closure and reports

2. To evaluate the Catalyst Program

Program Description

1. After brief theory input on effective closure, catalyst teams spent some time planning procedures for effective wrap-up of school projects.

2. Guidelines for report writing on school projects were presented, with respect to content, organization, and style.

3. Participants completed a specially prepared Program Evaluation Form, and the Area 11 Consultant Services Evaluation Form.

Verbal feedback on key observations about the effectiveness of the program was solicited in an informal discussion in the total group.

111. Program Evaluation Results

A. Mid-Program Progress Evaluation

The following is a list of evaluative statements made most often by individual catalyst team members on the form provided:

1 Things that are going well in the school project

   1) The working relationship, commitment and processes of the catalyst team are effective.
   2) There is growing ownership, commitment, involvement and agreement among staff members in relation to the project.
   3) Satisfactory progress is being made in the achievement of project objectives.
   4) Communication among staff is increasing.
   5) Leaders are emerging on the staff.
   6) The leadership of the catalyst teams is being accepted and supported by the staffs generally.
   7) Administration is supportive.

2. Things that are going well with the Catalyst Training Program

   1) Theoretical input and process models provided useful learning for individuals as well as for school projects, providing an integrating framework.
   2) Flexibility, allowing groups to move at varying rates.
   3) Short frequent sessions are ideal.
   4) Planning time provided teams away from school was very usefu
   5) Reading material.

3. Problems or difficulties experienced or perceived in school projec

   1) Limited time for staff activities.
   2) Attitude of scepticism, low commitment by some staff members.
   3) Impatience with rate of progress and expectations for immediate pay-off among staff.
   4) Lack of clarity re expectations and motivation of administrators.
   5) Conflict between some staff groups.

4. Problems or difficulties experienced or perceived in the Catalyst Training Program

1) Sharing information on school projects of limited usefulness because of differences in projects.
2) The pressure of time.
3) It is difficult to synthesize the great amount of information given in theory sessions and handouts for effective application to school projects.
4) Leadership training provided in the orientation session was not adequate.

5. How Problems in School Projects might be resolved

1) Provide more inservice time for project.
2) More clarity re general goals and purposes of specific activities.
3) More discussion with administration to establish clarity of goals, roles and processes.

6. How problems in the Catalyst Training Program might be resolved

1) More selection and sythesis of reading materials distributed.
2) Provision of more school time.
3) Eliminate project progress reports from agenda.

B. Evaluation of Consultants' Services

This section presents the data from the standard Area 11 Evaluation of Consultant's Services Form. Consultants who participate in the program did not complete the form. A few participants who missed the final session because of a conflict in the schedule also did not complete this form. The comments following the tabulation are direct quotations written on the back of the evaluation form.

TABLE 1

Evaluation of Consultant's Services

	1	2	3	4	5	Me
Contact:						
1. Was it easy to get in touch with the consultant?				1	8	4.
2. Were the consultant's services readily available?				2	7	4.
Content:						
1. Was the service rendered helpful?						
a) In obtaining materials			1	2	6	4.
b) In obtaining information				3	6	4.
c) In obtaining advice				5	4	4.
d) In obtaining aid				4	5	4.
2. Was the service of the consultant of practical value to the objectives of your program or to your needs?				3	5	4.
3. Did the consultant show:						
a) competency and expertise in relation to the task?				1	8	4.
b) able to direct you to appropriate sources of information related to your task?			1	4	4	4.

	1	2	3	4	5	Mean
Attitude:						
1. Did the consultant show a positive attitude toward your project?					9	5.0
2. Were you encouraged by the consultant?					9	5.0
3. Was there any follow-up contact by the consultant?				3	2	4.4
Workshop or Inserv[illegible]						
1. Were the objectives and general nature of this workshop clearly understood, before and during the workshop?				3	6	4.7
2. Were these objectives achieved?				6	3	4.3
3. Was the content useful?			2	1	6	4.5
4. Was the process used effective?				5	4	4.5
5. Did it suit your level of knowledge?				6	3	4.3

Comments:

Our staff selected an area of concern to be dealt with - individualization of instruction. Dr. Reimer's program fully helped us to deal with the problem effectively; it provided us with a means of selecting persons (leaders) to help the staff though the problem, a suitable time frame in which to deal with the problem, a model to solve the problem, information and material about the various aspects of the model, time to apply the model to our situation, access to resource persons, and when we needed it, assistance throughout the stages of our project.

1. One of the most positive aspects of the program was providing space and time out of our school setting for planning and getting a new perspective on the situation in which we work and operate every day.
2. No space was given on the questionnaire to be able to show how all the variables meld into a workable unit.
3. More important than any one aspect of the program such as content, the knowledge of the consultant or the availability of the consultant was his ability to create a surrounding and an atmosphere in which we were able to work constructively together, as a team, and do the job as we saw fit, with his advice and knowledge as input.

Questionnaires should not be completed in too short a time. School administration must provide time for catalyst curriculum committee within the school day. The present group received no consideration at all for lightening the regular school teaching load. Clear ground rules between school administration and consultant regarding on-going contact throughout the program. However the consultant should still be retained as resource person.

1. Time and space away from school environs very important.
2. So much material was made available that really need a pre-program reading list to enter actual planning with more "knowledge."

C. Program Evaluation

This section presents the data from a comprehensive evaluation of the program. Participants were asked to evaluate all aspects of the program on a five point scale. Provision was also made for comments. The questionnaire also included some general questions for written responses. All written comments and responses are given in the appendix. Here only the distribution and means (in parenthesis) are given of quantitative responses, followed by a brief interpretive summary for each item on the questionnaire, drawing from the written comments and responses.

TABLE 11

Summary of Program Evaluation Data

	Usefulness to School Project						Usefulness to Own Learning					
	1	2	3	4	5	Mean	1	2	3	4	5	Mean
1. Rate each of the stages in the program with respect to its usefulness (a) to your school project and (b) to your own learning.												
a) Three-day orientation			3	7		(3.7)			1	2	7	(4.6)
b) Needs Assessment		1	2	4	3	(3.7)			1	5	4	(4.3)
c) Objectives			5	3	2	(3.7)			2	4	4	(4.2)
d) Activities		1	2	2	2	(3.7)		1	2	3	4	(4.0)
e) Evaluation/Accountability				5		(4.0)			1	3	6	(4.5)
2. To what extent did the program achieve each of its stated objectives?												
General Objective -to provide support to staffs who want to initiate a curriculum development project.										7	2	(4.2)
Specific Objectives												
a) To encourage the development of programs at the school level in response to student needs.									3	6		(3.8)
b) To promote the use and development of leadership potential among teachers.									1	2	7	(4.6)
c) To provide supportive links between schools engaged in curriculum development for reciprocal learning.							1	5	2	1	1	(2.6)
d) To facilitate use of resource services available in the school division.								1	2	4	3	(3.9)
e) To initiate processes and provide skills in schools for effective ongoing curriculum improvement.									1	4	4	(4.3)
3. Usefulness of information given in training session.									1	5	4	(4.3)
4. Effectiveness of format in training sessions									2	5	3	(4.1)

Table 11 continued

	1	2	3	4	5	Mean
5. Format of Feedback/Problem Solving/Planning				4	4	(4.5)
6. Usefulness of Handouts			4	3	3	(3.9)
7. Assistance of consultants to your group			2	2	5	(4.3)
8. Appropriateness of provision for interaction with other groups.	1	3	6			(2.5)
9. General satisfaction with the program.			1	5	4	(4.3)
10. If the program were offered again, how strongly would you recommend to other staffs that they participate?			1	3	6	(4.5)

Comments:

1. Rate each of the stages in the program with respect to its usefulness (a) to your school project and (b) to your own learning.

   Catalyst team members foudn all stages of the program useful, both for the school project and for personal learning. However, usefulness to personal learning is consistently rated higher than usefulness to the school project.

2. To what extent did the program achieve each of its stated objectives

   Generally participants felt that the stated objectives were achieved to a high degree. This substantiates the parallel item (E-2) on the Consultant's Evaluation Form. One exception is the objective to provide a supportive link between schools, which received a mean rating of 2.6. The development of leadership potential among teachers received the highest rating at 4.6. No-one rated the achievement of the general objective of the program lower than 4 on a 5 point scale.

3. Usefulness of information given in training sessions.

   All participants found the information provided in the training sessions relevant and useful. However, some felt an overload because of the quantity and thought it might have been more condensed or selective. The mean rating was 4.3.

4. Effectiveness of format in training sessions.

   The format of the training sessions was rated at 4.1. However, some felt there was too much information relative to time and activities for practical assimilation. Also, at times they were not in phase with the progress of individual school projects.

5. Format of Feedback/Problem Solving/Planning.

   The mean rating was 4.5. Teams found the structure and consultativ assistance provided useful.

6. Usefulness of Handouts.

   Participants found the handouts to the point and useful in preparing for work with staffs. Most people felt that there was too much for them to digest given the time constraints. The mean rating was 3.9.

7. Assistance of consultants to your group.

   Assistance of consultants was rated at 4.3. Teams found consultants helpful in clarifying issues, generating alternatives, and providing advice and new insights in relation to their school projects.

8. Appropriateness of provision for interaction with other groups.

   The provision of interaction with other groups received the lowest rating, at 2.5. Participants generally felt that because the projects were so different in nature, were applying the general model differently, and were progressing at different rates, the information exchange was not too useful.

9. General satisfaction with the program.

   General satisfaction with the program was rated at 4.3. The highlight appeared to be the acquisition of practical skills related to leadership and group process.

10. If the program were offered again, how strongly would you recommend to other staffs that they participate?

    Participants were strong in recommending this program to other staffs. The mean rating was 4.5.

11. List the things you found most helpful about the program:

    The list of things that participants found most helpful includes virtually every aspect of the program. Recurring themes are the problem-solving approach, team building, theory input, skills development, structure provided, flexibility and adaptability, and ongoing consultation given by the consultants re all aspects of the school projects.

12. List the things you found least helpful about the program:

    The list of things people found least helpful was relatively short. Project feedback report sessions, overload of handout materials and the program being out of phase with the progress of individual school projects, were the three aspects mentioned by three or four people.

13. On the basis of your experience, what school staff conditions are necessary for participation to be successful?

    Catalysts were asked what staff conditions were necessary for successful participation on the basis of their experience. Responses can be organized into three areas: (1) Readiness of the staff. Reference was made to such factors as commitment to the project, open communication, desire to change, a common goal or problem, general willingness to be involved; (2) Administrative support based on an adequate understanding of th process was referred to frequently; (3) The staff must understand and accept the leadership role of the catalyst team.

TABLE 11

SUMMARY OF PROGRAM EVALUATION DATA

1. Rate each of the stages in the program with respect to its usefulness (a) to your school project and (b) to your own learning:

	Usefulness to School Project						Usefulness to Own Learning					
	1	2	3	4	5	Mean	1	2	3	4	5	Mea
a) Three-day orientation			3	7		(3.7)			1	2	7	(4.
b) Needs Assessment		1	2	4	3	(3.7)			1	5	4	(4.
c) Objectives			5	3	2	(3.7)			2	4	4	(4.
d) Activities		1	2	2	2	(3.7)		1	2	3	4	(4.
e) Evaluation/Accountability				5		(4.0)			1	3	6	(4.

2. To what extent did the program achieve each of its stated objectives?

	1	2	3	4	5	Mea
General Objectives - to provide support to staffs who want to initiate a curriculum development project				7	2	(4.
Specific Objectives						
a) To encourage the development of programs at the school level in response to student needs			3	6		(3.
b) To promote the use and development of leadership potential among teachers			1	2	7	(4.
c) To provide supportive links between schools engaged in curriculum development for reciprocal learning	1	5	2	1	1	(2.
d) To facilitate use of resource services available in the school division		1	2	4	3	(3.
e) To initiate processes and provide skills in schools for effective ongoing curriculum improvement			1	4	4	(4.
3. Usefulness of information given in training session			1	5	4	
4. Effectiveness of format in training sessions			2	5	3	
5. Format of Feedback/Problem Solving/Planning Sessions				4	4	

3. Usefulness of information given in training session
   - I found information relevant and to the point
   - Possibly less written information could be handed out Information could have been further condensed
   - Though there was sometimes a large volume of information and it was difficult to digest it all, what we received was very useful
   - Too much to be used easily
   - In each area of the process studied, pertinent and up-to-date information was given and further material available on request
   - Provided clarity of planned approaches

4. Effectiveness of format in training sessions
   - Format was good in that it provided time to plan
   - At times too much information was presented without activities available to make use of the information. Possibly some reading should have been done in advance of each workshop
   - Perhaps not individualized enough. That is, input sessions with the schools involved.

5. Format of Feedback/Problem Solving/Planning Sessions
   - Your help when we ran into difficulty was very useful
   - Provided a pattern that was easy to follow and helped us in setting up our own inservice.

SUMMARY OF CURRICULUM DEVELOPMENT CATALYST PROGRAM EVALUATION

June 14, 1977

1. Rate each of the Stages in the program with respect to its usefulness (a) to your school project and (b) to your own learning.

	Usefulness to School Project					Usefulness to Own Learning				
	1	2	3	4	5	1	2	3	4	5
a) Three day orientation			3	7	(3.7)			1	2	7(4.6
b) Needs Assessment		1	2	4	3(3.7)			1	5	4(4.3)
c) Objectives			5	3	2(3.7)			2	4	4(4.2
d) Activities		1	2	2	2(3.7)		1	2	3	4(4.0)
e) Evaluation/Accountability				5	(4.0)			1	3	6(4.5

2. To what extent did the program achieve each of its stated objectives?

	1	2	3	4	5
General Objectives				7	2(4.2
Specific Objectives					
1) To encourage			3	6	(3.8
2) To promote			1	2	7(4.6
3) To provide	1	5	2	1	1(2.6
4) To facilitate		1	2	4	3(3.9
5) To initiate			1	4	4(4.3)

3. Usefulness of information given in training session 1 5 4
   - I found information relevant and to the point.
   - Possibly less written information could be handed out. Information could have been further condensed.
   - Though there was sometimes a large volume of information and it was difficult to digest it all, what we received was very useful.
   - Too much to be used easily.
   - In each area of the process studied, pertinent and up to date information was given and further material available on request.
   - Provided clarity of planned approaches.

4. Effectiveness of format in training sessions 2 5 3
   - Format was good in that it provided time to plan.
   - At times too much information was presented without activities available to make use of the information. Possibly some reading should have been done in advance of each workshop.
   - Perhaps not individualized enough. That is, input sessions were not well timed with activities or inservice sessions with the schools involved.

5. Format of Feedback/Problem Solving/Planning sessions 4 4
   - Your help when we ran into difficulty was very useful.
   - Provided a pattern that was easy to follow and helped us in setting up our own inservice.

1 2 3 4 5

- A little too much time spent on feedback-not too relevant at times since people were involved in different projects, worked at a different pace from the uniform expectation.

6. Usefulness of handouts 4 3 3
   - Just didn't have the time to go through the stacks received.
   - Useful but there were so many it became overwhelming at times.
   - Time to read them was the only problem.
   - Good handouts, but too many.
   - Excellent material and most useful.
   - Cannot cope with volume given. Handouts should be more selective. Haven't time to digest contents
   - Much material could have been selectively "culled" to reduce superfluous verbage!
   - Shared many with all staff members.
   - Quite relevant to the problems dealt with.

7. Assistance of consultants to your group 2 2 5
   - Assistance was excellent, very willing, caring and involved.
   - Especially in helping me to clarify what I was going to do back at school.
   - Provided us with much good advice and insight into the total situation as well as unthought of alternatives.

8. Appropriateness of provision for interaction with other groups. 1 3 6
   - The provision of interaction was present; however since the groups were at such different points, the interchange was not always relevant.
   - I found it useful to know what other groups were doing. However at times each group was involved with their own school problems and this was less useful to our group.
   - Projects too far apart
   - We interacted very little with the groups from other schools. Their projects seemed much different from ours.
   - Really cannot handle more than one diversified group at a time.
   - We differed so much in terms of position in theoretical model that interaction was minimal.
   - Should not be done regularly-periodically.
   - Difficult to interact because groups were working in quite different areas.

9. General satisfaction with the program. 1 5 4
   - Feel the program satisfied its objectives. Also I feel I gained some information and useful skills.
   - I learned a great deal from this experience and appreciated the opportunity.
   - helped me to acquire leadership skills.
   - a great learning experience of group process.
   - having an internal consultant.
   - Needed more time to digest information; and master some of the skills involved.

	1	2	3	4	5
10. If the program were offered again, how strongly would you recommend to other staffs that they participate?			1	3	6

11. List the things you found most helpful about the program:
- availability of help from consultants.
- skills and information provided was very helpful.
- helped me learn to organize my own thinking.
- helped me learn to make a set of objectives with a group and plan ways of achieving these objectives.
- helped me learn how to help a group keep working toward their objectives.
- planning time built in.
- provisions for different staffs to be at different stages of program.
- sessions short and to the point.
- consultant helping people become aware of alternative actions suited to dealing with a problem, step, etc.
- clarification of ideas ab out curriculum development.
- useful model - have applied it in personal planning of subject areas.
- focused staff attention on single problem.
- has brought about change in school.
- theory input at the beginning - "Common Sense."
- working using aprocess or pattern to follow.
- finding out the possibilities available in close teamwork. We had an extremely good working group.
- the consultant, E. Reimer's advice re working in the area of staff and administration authority and trust levels. He defined parameters for us.
- space and planning time made available outside the school setting.
- at the beginning the exercise of working through the Ratz situation could have been extended and evaluated and even related to the steps we followed through to show theoretical use of the steps and provide review, etc. It was, however, a valuable beginning.
- handout information re process.
- reference information that pertained to workshops and inservices we held.
- Group dynamics information which helped us evaluate the communication process evolving in our school, thus helping us evaluate our objectives as we proceeded.
- Help in planning and running an inservice both as a team and on an individual basis. We have all had experience in every area of presenting an inservice - introduction, the workings and activities of staff,and in concluding and evaluating an inservice
- close contact enabled me to get to know the committee members much better, and helped me understand their problems and misgivings.
- appreciated learning techniques of small group dynamics.
- theoretical data and background.
- provided a "scientific" justification of things I have slowly and intuitively built into my own teaching and program development.
- gave planning time away from school.

11. continued
    - information and ideas on the various stages of the program.
    - opportunity to work as a team on a staff project.
    - opportunity for consultants input on the staff project.
    - the input from consultants.
    - the material gathered and handed out.
    - the opportunity for the leadership team to receive simultaneous input and follow-up with their own planning.
    - awareness of personal leadership qualities.
    - writing specific objectives.
    - planning teacher Inservice.

12. List the things you found least helpful about the program.
    - feedback from other groups
    - written information
    - hearing detailed accounts of the progress of other staffs.
    - more handouts than I could read.
    - too many handouts, many of which were repetitive.
    - sessions were too far apart.
    - our project did not fit with the schedule of sessions. Some schools way ahead and some far behind.
    - Sessions that were not at the point in the process at which our school was working.
    - feedback sessions that seemed irrelevant at the time because the project the group was working on was not clear.
    - Piecemeal provision of materials and theory. I like to get data first and then build own structure , not operate in a step in the dark manner.
    - Lack of communication among various groups involved in the program.
    - listening to the reports from others about their project.

13. On the basis of your experience, what school staff conditions are necessary for participation to be successful?
    - staffs which have done a lot of P.D. work prior to this project.
    - agreement and support of principal
    - a staff that is ready and willing to explore new ideas and new ways of teaching and planning programs.
    - being committed to working together toward a common goal, receptiveness.
    - friendly, relaxed atmosphere (supportive) with a focus on common problem.
    - must be communication among staff members and a desire to want a change to be brought about. Active participation by all staff who say they are concerned.
    - open communication among staff members. That has been the most important, plus the open cummincation of our program is evolving amongst the total staff, raising trust levels.
    - staff involvement from the start.
    - a clear statement of parameters for catalyst committee
    - acceptance of leaders to staff; credibility of leaders among staff.
    - readiness on part of staff to undertake identified project.
    - administrative support for project.
    - total commitment by staff and administration

-support from administration.
-credibility of leadership team among staff.
-cooperation of staff and administration, commitment, ease of communication.

14. If the program were offered again, what changes would you recommend?
-more sessions, or rather spaced out sessions over a longer period of time. Found it very hard to integrate all the information.
-schools entering should begin by finding a common problem for their staff - before entering C.D.C.P. - perhaps through survey process.
-needs and objectives sessions should be done together and done right at the beginning.
-schools should go through process to arrive at problem. Groups did not know what the problem they were tackling was. Survey feedback process might be much more valuable first for such groups.
-Provide more information to school staffs. Tell them what it is all about; give them time to respond and have a problem to begin with. The latter point is not absolutely essential, but it is preferable.
-an overview including activities and evaluation that could be a planning model.
-more time built into the working day for planning.
-some data: articles and books should be made available before program itself begins to give individuals time to build background knowledge relevant to program.
-more interaction between consultant and leadership groups re the project undertaken.
-more interaction among groups involved in the program.
-perhaps one group of leaders to a staff should be involved.
-synchronization of material handed out and group leadership team needs.
-do the leadership training program as a "one shot" deal in consecutive days so that participants can go through the whole model that can help with overall planning with individual staff projects. Do this with simulated activities. Have periodical meetings to give details relating to different stages of project.
-some involvement with external consultant and administration.

Case Study B

Adams County, School District No. 12

An MBO/OD Based Program

Michael Fullan
Ontario Institute for Studies in Education

(Part of a larger report on the State of the Art of OD in Education, funded by NIE to Michael Fullan, Matthew Miles, and Gib Taylor)

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A. INTRODUCTION

The Setting

The best way to introduce Adams County is to describe the structure and the system as it now exists, under the superintendency of Dr. George Bailey who was appointed in 1972, and secondly to provide a brief historical contrast concerning its pre-1972 years.

Adams County School District No. 12 is a medium sized school district in the suburbs of Denver, Colorado. It contains 25 schools (16 elementary and 9 secondary) with some 19,000 students, 950 teachers, 43 principals and assistant principals, and about 14 central office administrators and specialists. The average expenditure per pupil is about equal or below that of surrounding school districts. The central office staff is headed by a Superintendent and three Assistant Superintendents, one each for Curriculum and Instruction, Management Services and Auxiliary Services. Under the Assistant Superintendent of Management Services there is a Director of Organizational Development and Personnel, and a Director of Management Analysis and Evaluation which are of particular interest to us, although the work of the other two superintendencies is also relevant.

The Board of Education consists of 5 members elected for six year terms on a rotation basis every two years. Each of the twenty-five schools in the district has an elected Parent Advisory Committee (P.A.C.) with some 10 to 20 active members depending on the size of the school, which works with the school on matters of policy and school-community relations. In addition to the Board there is a State required District Accountability Advisory Committee (D.A.A.C.) which is advisory to the Board on matters of accountability concerning the goals and quality of programs. The D.A.A.C. consists of about 60 members - each of the 25 PAC's elect two representatives, along with four high school students and one central administrator. According to the state law, the D.A.A.C. serves in an advisory capacity to the Board. The Board has asked this committee to receive information and provide feedback on six major areas:

1. assessment of needs of the district
2. appraisal of goals
3. appraisal of goal-oriented student achievement
4. appraisal of co-curricular concerns
5. appraisal of district policy and practices
6. appraisal of resource needs

(Adams County, Education for Excellence - 1977, p.215)

The community ranges from upper class residences to poor, state supported housing. In response to our questionnaire the district classified its community as 10% upper middle class, 40% middle class, 40% working class (blue collar) and 10% working class (semi and unskilled) - both a range and a balance of different types of community. With a supportive Board and a stable suburban community, the school district has not been faced with major urban problems and political instability which have plagued other city school districts.

Each school has a Faculty Advisory Committee (F.A.C.) which has one member for every ten teachers elected by the teachers (this means that FAC's contain from 2 or 3 members to as many as 14 in the larger schools). The FAC's work with the principal and meet regularly once or twice a month and perform a liaison function with the rest of the staff on both individual and organizational issues. The FAC's and the principal plan the agenda of staff meetings which are held at least monthly.

The organization for curriculum and instruction is also systematic. Each of the 10 subject areas (K-12) - art, language arts, mathematics, music, physical education, reading, science, social science, special education and vocational education - has a Standing Committee (Standing Subject Area Committee - SSAC) which has one representative from every school for each committee as well as representatives from the central curriculum department and citizen representatives of the DAAC (thus the size of each committee is in the range of 30). These standing committees provide for "program and instructional objective construction, objective validation, basic text adoption, program review and/or modification, curriculum scope and sequence recommendations, and improvement of teaching strategies" (Adams County, Educating for Excellence, 1977, p.i). In addition to the SSAC's there is a District Curriculum Coordinating Team (DCCT) made up of one representative from each of the SSAC's and central office representatives including the Assistant Superintendent of Curriculum. The DCCT reviews and makes recommendations on district-wide curriculum planning, new developments, revision and improvement.

Structurally, then, the communication and decision-making organization which has evolved since 1973 in Adams County can be characterized as being systematic, comprehensive and based on a linking pin principle (Likert, 1961) where committee membership often consists of representatives from other committees and as such, provide a basis for the systematic linking of information and decisions at different levels of the system. However, this was not always the case in Adams County.

It was agreed by all those we interviewed (who had been in the system prior to 1973) that for the twenty years prior to 1972 the County had been organized and run in a stagnant, centralized way. Appendix A contains a contrast between the pre and post 1973 systems. The changes were initiated in 1972 with the hiring of Dr. George Bailey, a person who combined theoretical conceptions of the way school districts should be organized with practical knowledge and experience. He had been both a professor of educational administration (at the time of his hiring) and a superintendent of another school district (previously). Some of the details of the program are analyzed in subsequent sections. Suffice it to say at this time that an attempt has been made in the past five years to change a system which had become stagnant over a 20 year period - from one which was organized on a split between elementary (K-6) and secondary (7-12) program with two different superintendents, to one which is integrated on a K-12 basis with one superintendent of curriculum. From one which was apparently autocratic and centralized with downward communication and decision-making to one which is organized with principles of staff involvement and learning. From one in which the curriculum and job descriptions at all levels were loosely and/or inductively defined to a system which makes explicit the objectives setting, criteria for hiring and promotion, job descriptions, and the criteria of performance for all personnel. From one in which many parts of the system were unclear and/or uninvolved to one which attempts to clarify and involve all groups including the Board, central office staff, the community, principals and school staff, students, office and custodial personnel. How all this was done, people's perceptions of it, and its impact are the substance of much of the rest of this case study. Before describing the program, a short description of the methodology in order.

Methodology

As with the other two case studies, Adams County was one of the 76 school districts which had sustained OD programs and which provided questionnaire data. In selecting the three cases our main criterion was that the cases would represent different approaches or primary focusses to OD. Adams County was one of the few cases which explicitly combined MBO and OD.[1] Because MBO is a major systems oriented approach to OD which is prominent in the literature, and which promises to deal more directly with task and structure, we were interested in including such a case, along with other cases which might be more process oriented or curriculum focussed. It was a *variety* of approaches within a broadly conceived notion of OD which we attempted to achieve in the case studies. Adams County with its self-confessed use of MBO and OD represented one distinctive and important configuration which seemed worth including.

In December, 1977 we contacted Dr. Harvie Guest, the Director of OD and Personnel in Adams County, to ask if they would be willing to participate in our study of OD in school districts. We explained the overview and other components of the study as a whole. We also indicated that our method of doing the case study would involve 1) having access to all OD documents and other material which would enable us to describe the program and data on its impact and 2) a three day site visit to the district in which we would like to interview a number of people from all levels of the system. Our interview as described before, focussed on people's perceptions of the goals and purposes of the different programs, reasons for success and failure, use of internal and external consultants, and perceptions and data about the impact of the effort.

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[1] We recognize that it is difficult to separate MBO and OD in all respects and that they do overlap. It is the case, however, that people *describe* their programs as MBO or OD. Adams County refers to its program as being based on both MBO and OD. In fact, one of the main purposes of the case study is to obtain a clearer conception of what people mean by these terms in practice. As we will see in Section II, Adams County uses the term OD to refer to the whole enterprise (with MBO as one of the components which they use).

A decision was taken immediately to participate in the study. We obtained various documents and arranged for a three day visit for late January, 1978. At our request interviews were set up with about twenty people from different levels of the system, namely:

All key Central Office Personnel (Superintendent, Assistant Superintendents, and all directors)	N = 7
Board and District Advisory Accountability Committee	N = 2
Principals/Assistant Principals	N = 5
Teachers	N = 7
Total	N = 21

We suggested that the main criterion of selection be that those selected be not atypical of their constituencies. Of course, in the case of principals and teachers we cannot claim that such a small number is representative. We tried to avoid obvious biases in the selection. And in the interviews we probed the interviewee's perception of their colleagues views. In presenting and drawing conclusions from the interview data we will return to the question of how representative the sample might be.

In any case, in response to our request, interviews were set up. In the words of the Director of OD:

> "We have tried to determine a cross-sectional representation of employees to give a broad picture of the various audiences we are serving" (letter, December 29, 1977).

The site visit and interviews took place in late January. The co-operation, climate and seemingly total access to information was such that we felt we were obtaining full and complete information from the people we interviewed.

The next several sections are based on the description and perception of the various parts of the MBO/OD program, namely:

II. the nature of the MBO/OD program and activities

III. goals and purposes

IV. reasons for success

V. problems of implementation

VI. use of internal and external consultants

VII. impact on the district

VIII. conclusions

Section II comes largely from documents, sections III to VI are based primarily on interviews, and section VII is based on both the interviews and on evaluation reports (especially from the Director of Evaluation's division).

II. THE NATURE OF THE OD/MBO PROGRAM

We have already described the organization and structure of Adams County. In this section we begin by identifying the main, specific MBO/OD programs which are carried out in the district, and we end by formulating the assumptions and principles which underly the program as a whole. We will be describing what the programs and assumptions are, not how they work in practice, which is the focus of subsequent sections.

Appendix B summarizes the chronology of OD events in a spiral diagram beginning in 1972 and ending in the fall of 1977 (with an accompanying sheet headed "Organizational Development System" which more or less summarizes the same information - for those who cannot read the spiral diagram without falling off the chair). Appendix C lists the "Organizational Development Activities" as seen by the district.[2] A number of observations can be made about Appendixes B and C. First, a tremendous number of different activities have taken place from 1972-1977. Second, the effort started centrally and spread outward, that is, it began with a Board/Superintendent agreement (1972), moved to central team development (1973), then to principals (1974-5), teachers (1976-7), and others in 1977 (e.g., secretaries).[3] Third, at first glance the system and the 21 OD activities (Appendix C) appear to be an ad hoc collection of programs which seem to be neither related to each other, or (many of them) related to OD - an issue which we will address throughout this section. Fourth, note that the effort as a whole is labelled OD with MBO as one of its subcomponents. Given the eclectic nature of the programs, it seems that OD is the catchall for everything. As we will see, in one sense this is true. In another sense, however, we will be able to identify a number of specific common assumptions and principles which underly all of the programs.

In order to understand how this seemingly complex system works (and even to understand what it is) we will discuss two things. 1) provide a brief description of the main OD activities to give a flavor of the kinds of foci in the effort, 2) describe the specific assumptions and principles on which these programs were selected and which give direction to the activities. We also indicate how the various activities are coordinated.

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[2] Several of these programs are described in one way or another in Bailey, 1977.

[3] Of course, as each new group is added continuing work was done with all previous groups. In fact, it is more accurate to say that the various groups were integrated into the system as it expanded.

The formulation of assumptions and coordination necessitate a discussion of the roles of the Superintendent and the Director of OD. Discussing the assumptions of the program will be tantamount to identifying the strategies for developing the OD program for the district and the official goals of the program. The latter will provide a link to section III. In brief, the next two sections contain 1) a description of the programs and 2) assumptions behind and coordination of activities.

1. Description of the Main OD Activities

The main purpose at this point is simply to describe the content of the main OD activities without attempting to show how they are coordinated or interrelated (this is the task of the next subsection). Appendix C lists 21 activities. Several of them are directed at particular content concerns - gifted, food services, bus driver, management agreements, discipline, criterion reference testing, staff development in relation to handicapped students. We will not discuss these (reports are available on each of them for those who might be interested) nor will we discuss all of the other more process and task oriented efforts. We can, however, describe briefly the five major programs (major in the sense that they involve a large number of district personnel, and are directed at important process and task issues) - administrator and teacher perceiver (SRI), administrator and teacher MBO, Leadership Development (AMA), conflict resolution cadre, BASICS (a teaching/learning strategy). It should be remembered that the structure of Adams County described in the introduction provides the context for the use of these OD training activities. Stated another way, these training programs are designed to improve individual and group capacities to function effectively as members of FAC's, PAC's, Subject Area Standing Committees, District Curriculum Coordinating Team, and in individual roles as principals, school staff members, and central office staff members, etc. etc.

In each of the programs below we describe briefly what it is, with whom and how it is used, and its purposes.

(i) Administrator and Teacher Perceiver (SRI)

The SRI program is a process to select personnel with certain qualities and to understand and contribute to their further development once hired. It is based on a program developed in Nebraska which has carried out research originally on dentists and recently on educational administrators and teachers to identify and measure common traits which differentiate successful from unsuccessful candidates (see APA, 1974). These common traits, underlying assumptions and use of the program in Adams County are summarized in the following paragraphs:

There are 12 common traits or themes which form the basis for assessing candidates. For example, two of the themes as applied to managers concern being a Relator and Ambiguity Tolerance described as follows:

Relator

The relator is evidenced when the manager desires to and does have strategies to build relationships with staff. This person expresses feelings and thoughts openly and encourages others to do likewise. This manager is committed to an extended and enduring relationship of mutual support.

Ambiguity Tolerance

The manager displays a tendency to suspend judgment until as much evidence as possible is available. A high tolerance for ambiguity exists with much restraint placed upon impulsive decision making.

(See Appendix D.1 for a description of all the other 10 themes)

The assumptions about people's potential and a means of growth are contained in Appendix D.2. For example, one assumption reads that

> "the best way to assist in the development of Professionals is on an individual basis within an organization of people committed to the development of each other"

Another one states:

> "We believe it is possible to predict the attitudes and behaviors of an individual through a thoroughly researched, structured, stress-free interview"

The SRI perceiver is reported to have a high degree of interrater reliability and concurrent and predictive validity, although it is recommended that this be tested in each situation (APA, 1974: 11-13).

The SRI program, which was initiated in Adams County in the summer of 1974, involves several related activities. In the first place, selected Adams County personnel are trained by the Nebraska Academy in the assumptions, nature and use of the SRI interview. They become specialists in how to perceive the 12 traits in question. This training began with central office personnel and now includes principals. As with other programs, a multiplier approach to training is used whereby some district members receive external training and become in turn internal trainers for other district personnel. The SRI is used for two different, but related purposes. First, all new teacher and administrator candidates are required to participate. Structured interviews are used by trained personnel to hire new teachers and to promote administrators with characteristics related to the 12 themes. It is difficult to see in this instance how the assumption of a "stress-free interview" can be fully met although it is true that the basic orientation of both the SRI and the district management is toward personal growth. Presumably, people who are lacking in most of the traits are not hired or promoted. The second and related purposes concerns its use for personal professional growth counselling after employment (in the case of new teachers), and in relation to promotion (for successful and unsuccessful candidates). Thus, the profiles of individuals which would contain both strong and weak performance among the 12 traits would be used to design a personal development program (this is described in the next section because it involves other programs).

It is necessary to clarify how the information on the SRI traits is obtained at various points. Initially, the information is obtained through structured interviews with new candidates external to the system. Once people are employed in the district, data comes from both the candidate (in structured interviews) and from peers, subordinates and supervisors who fill out SRI perceiver questionnaires containing some 72 items in relation to the 12 traits. Although the latter information is used for promotion, its main use for most people concerns their continuous ongoing performance within a role. At this time it is used on a regular, interval basis for all central administrators, all principals, and some teachers. Regarding teachers, it can be recalled that all new teachers are required to use it. It is currently being encouraged for use with all teachers (more about this issue later), but at this time it is voluntary (some staff members in 7 schools are using it).

(ii) Administrator and Teacher MBO

Dr. George Bailey was a professor of educational administration in 1972 when he was hired by the Board. He was deeply committed and knowledgeable about major principles which would guide his work in the district. One was that objectives and performance criteria in education should become clear and measurable. The second principle was that this should be done through a process of participation. The main criterion of participation was that people would attempt to arrive at explicit objectives and standards of performance, and would accept responsibility for helping themselves and others achieve them. Third, the process must be based on a value of individual development. It must be a humane, developmental process. He was oriented to finding ways of integrating this individual and organizational development.

As soon as Dr. Bailey was hired he initiated an MBO system in the Board starting first with himself by writing a "Superintendent's Performance Agreement" contract with the Board (Bailey, 1977: Role Clarification section). From that point he moved gradually to put the entire district on an MBO system, the main features of which are described below:

There are two levels of objectives setting. One involves the district level objectives, the other concerns individual and role descriptions in support of these goals. District level goals have been formulated over the past few years throughout the district through the structure of committees which are designed to provide systematic input for district policy making. It is impossible to report on all the objectives in the district. An overview of the general priorities for 1975-78 is listed in Appendix E.1. The priorities are listed in three main categories - student centered, management centered, and organization centered. Further objectives for the entire K-12 curriculum are detailed in the report Educating for Excellence (1977).

Although the district objectives are probably more detailed and more comprehensive (e g., by including curriculum, management and organizational goals) than in most school districts, there is nothing particularly remarkable about the objectives qua objectives. What is remarkable is the system of implementation at the role level. This system includes the formulation with the role inclumbent of a position description, standards of performance and management agreements for each role which in turn is monitored in an interlocking system of one to one monitor/monitoree relationship. For example, one of the objectives for the superintendent is:

> To ensure that the board is provided with adequate information for policy and decision-making functions.

Attached to the objective is a standard of performance:

> Not more than 25% of official decisions by the Board will require information other than that provided at Board meetings.

A procedure for accomplishment:

> Provide the Board with recommendations and supporting data for decisions and actions at official meetings. Information packets will be delivered at least 3 days prior to regular meetings.

With other indicators of achievement:

> The Board will indicate no dissatisfaction with reports.

Performance is reviewed by the monitor and monitoree on a quarterly basis. The review code refers to performance as "on target", "behind schedule", "completed", "revised", etc. If behind schedule, action plans are designed by the monitor and monitoree which are again reviewed quarterly. More specific information on the monitoring process as a whole is contained in appendices E.2 and E.3. As with other programs in the district, the process is characterized by explicitness of objectives and criteria of performance, regular (quarterly) communication and review, based on the assumption that the review should be private (between the monitor and monitoree) and analytical rather than evaluative (see Appendix E.3).

Currently, all 104 administrators (central administrators, principals and assistant principals) function under this process, with one person's monitoree being another person's monitor. The system is structured in a downward flow, i.e., the Board monitors the superintendent, the superintendent monitors assistant superintendents, who in turn monitor directors, who monitor supervisors and consultants. Principals are monitored by central staff, and in turn monitor assistant principals. Thus, all administrators are monitored by at least one person and everyone has from one to ten monitorees (some central staff have ten).

Teachers have been involved in the MBO monitor/system only on a voluntary basis. Staffs in 7 schools are currently participating. An attempt is being made by the district to encourage its use with all teachers in the system.

Two other comments should be made about the MBO system. First, it is not a single package which has been imported from outside. It draws from a number of sources - basic coneption of MBO in the literature, specific techniques (e.g., monitoring system) from one source or another, content of objectives and position descriptions from various sources internal and external to the system. In the end, it has evolved in the district to become a distinctive, adapted system peculiar to Adams County.

Second, other so called OD programs we describe in this section are part of the MBO system and vice-versa. For example, the SRI perceiver traits and related performance is used in the monitor relationship to set performance objectives and evaluate progress, and often become some of the particular objectives to be achieved in a given role. The Leadership Development (AMA) program is also related.

(iii) Leadership Development (AMA)

The American Management Association's Leadership Development program is a specific version of MBO leadership training. It was initiated in the fall of 1976 in a manner typical of the adoption of programs in Adams County. The AMA program seemed to be a more specific and more comprehensive approach to role and job clarification and description. The program focussed on developing knowledge and skills in the management functions of planning, organizing, communicating, directing and evaluating organizational performance. Four senior members of the central staff (the superintendent, director of OD, etc.) were trained as trainers of the AMA program. These four have trained other people in the system to become trainers, and so on in a multiplier procedure. All 104 administrators took the program in 1976. The course involves ten weekly three hour sessions which examine the five management functions (mentioned above) in relation to developing position descriptions, organizational arrangements, standards of performance and appraisal of performance. In this respect it has been adapted to the previous MBO system. It is seen as compatible with the MBO system, but easier to understand and apply. The AMA course is currently taught (by district personnel) every semester to new candidates (e.g., new administrators or people in the system aspiring to become leaders).

(iv) Conflict Resolution Cadre

Training in conflict resolution was also begun in 1976. It was felt by the Superintendent, the Director of OD and others that the day to day organization would deal with most problems, but that a skilled, independent cadre would be beneficial for addressing disagreements or conflicts which could not or were not being handled through regular channels, and which could become disruptive if allowed to persist. A cadre of 18 people were selected by each of the following groups - teachers, principals, specialists, directors, and parents (accountability committee). They received training from an external consultant in the management of conflict (and as usual, received training themselves in how to train new cadre members in the future). A brochure on "Guidelines for Using the Conflict Resolution Cadre" is distributed throughout the system which among other things lists the names of the eighteen members, states that any parent or employee of the district may request assistance, and that a small cross-sectional team will assist in the case with the initial meeting being an exploratory one with one member of the team. The cadre is coordinated by the Director of OD. The Cadre has handled five cases in its two years of existence. These incidences have included three cases of subordinate/supervisory problems, one case of FAC/principal conflict, and one case of conflict between two teachers.

(v) BASICS (Building and Applying Strategies for Intellectual Competencies in Students)

We have stated that the OD effort in the district commenced with administrators and gradually spread to teachers. This meant that the focus on curriculum was gradually phased in. It began with some general objectives, and really didn't get underway until 1975 when the Standing Committees were organized, and the master plan for curriculum was developed (Education for Excellence, 1977). Teachers started by formulating criterion referenced objectives which resulted initially in some dissatisfaction (see the interviews) with the purpose of the activity, the amount of work, and the means of implementation. On the other hand, there was one major program - BASICS - which was piloted in 1975 in two elementary schools and which was designed to train teachers in implementing objectives based education. The BASICS program was developed at the Institute for Curriculum and Instruction, in Miami, Florida, based on Taba's theory of foundation thinking skills and sequential patterns of learning levels of thinking. The program is described in several brief articles from the Institute (see Description of BASICS Learning Skills, 1977). It involves the identification of basic thinking skills (e.g., observing, classifying, inferring meaning, concept formation, attitude formation and/or change, etc.) and the training in teaching strategies (e.g., diagnosing, designing learning opportunities to develop thinking skills and attitudes in all subject areas to achieve the intended outcomes in reference to the thinking skills and other achievement objectives.

Again, external consultants (from the Institute for Curriculum) are used to train internal personnel as trainers of others in the system. Currently, 5 teachers have been trained as "district trainers" to implement the BASICS program in 2 elementary and 2 high schools through staff development programs.[4] Since it is the assumption that administrators have to know programs in order to be able to provide assistance in implementation, 10 principals are now being trained to prepare staff development programs in BASICS in 7 elementary and 2 secondary schools. Total staff who will be involved is approximately 90. Thus, it can be said that training in teaching strategies - in what teachers do in the classroom - is still at its early stages of evolution. As with other programs, BASICS was selected because it was compatible with district objectives and could be adapted for use. In addition to BASICS, the district is currently designing a model on the teaching-learning cycle based on ideas from a program in California named Learning Model Development. A task force of teachers, principals and central administrators has been assigned to undertake the development which will identify required teaching skills in specific terms, and will incorporate the BASICS model as well as other skill areas. The identified skills will then become the focus of teacher in-service training programs. This is still at the early stages of development.

2. Characteristics, Assumptions and Coordination of the OD Effort as a Whole

Two sets of issues remain to be addressed. The first involves pulling together the main characteristics and assumptions which seem to underly the effort as a whole. The second relates to the need to describe how the OD effort is coordinated, its costs, and so on.

We have already stated or implied the main characteristics or assumptions common to the program. To summarize the program as a whole, the following features stand out:

(1) it has strong central guidance and support from the top (the superintendent)

(2) the approach has involved taking a fixed system in 1972 and attempting to change the system in almost an opposite direction in the space of five years.

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[4] Staff development approaches are described in the next subsection

(3) the broad strategy was based on addressing role and team development of central administrators as a precondition to the spread to other members of the system - principals, teachers, parents.

(4) the program at first glance is eclectic and adaptive, but is integrated by a number of common features and assumptions:

  (i) the structure of communication and participation is at once systematic and comprehensive based on a linking pin principle. There is an attempt to reach and involve every person in the system.

  (ii) role clarification, objectives specification and standards of performance are common to all subprograms.

  (iii) a focus on the individual as well as on the organization. Both in terms of values (information should be used for individual growth) and structurally (the individual focus of the monitor/monitoree relationship), individual development is promoted within the context of the system. There is an attempt to balance and integrate individual and organizational needs, to use objectives and performance information for improvement rather than judgment. (We are not claiming at this point that it works as intended. We are simply stating that there is an explicit value and emphasis on the development of individuals under supportive conditions. The interview and impact data in sections III through VII contain data on the extent of implementation.)

  (iv) changes are directed at all aspects of the organization - structure (K-12 integration, committees), tasks (e.g., role clarification), and process (e.g., relational skills in the SRI and AMA).

(5) external ideas and programs are utilized heavily, but are adapted and integrated or used in mutually reinforcing ways. There is no dependence on any single system or package. Programs are screened and selected primarily on their ability to meet the four criteria just stated in (4). They are examined and updated according to how they can provide greater specification and/or can complement other programs. In the latter sense, it can be said that there is often more than one method to meet a given goal. The conflict cadre is a back-up system, if the regular system doesn't work. The AMA program provides greater specification to the MBO description.

(6) Finally, external consultants are used frequently, but primarily to train trainers, to help install in-house capacities for training others in a multiplier procedure within the district.

These six characteristics[5], of course, relate to the official OD goals of the district. How these goals are stated by the superintendent and perceived by others in the system is the subject of Section III. Before turning to that summary, we would like to conclude by describing how the OD program is coordinated. It is essential and instructive to discuss the evolution of the role of the Director of OD. First, the role has changed from one of doing all of the direct training in the early stages, to one (with a new director) emphasizing coordination and training of others to be trainers. This philosophy evolved as part and parcel of the strategy of the multiplier effect. Second, from 1972-1975 (the first three years) the Director of OD operated in a staff position to coordinate and provide in-service training. There was a Director of Personnel who was responsible for hiring and promotion and a Director of OD. In 1976 the superintendent combined the two positions which now operates as one position with the title of Director of Organizational Development and Personnel. The purpose was to integrate hiring and selection criteria and training with ongoing in-service training all coordinated by the Director who functioned in a line-relationship with all employees of the district - another example of the systematic way in which organization development is pursued. Prior to the integration, the Personnel division had operated in a traditional manner with emphasis on testing without a conception of staff development. The Director of OD and Personnel has a small, full-time staff of nine, including clerical assistance. Most of this staff is for the Personnel function. Only the Director of OD (part of his time), one supervisor and one secretary relate directly to OD.

The Director of OD and Personnel works with the various committees to 1) help select external resources (programs, consultants) and 2) to set up and coordinate an ongoing training system. In addition to the training programs already described, a large number of ad hoc in-service programs are run which are designed to meet particular in-service needs (see Appendix F). All of the programs constitute a calendar or inventory of in-service resources which is distributed throughout the district. Each school has 8 one-half days allocated for in-service. A minimum of 50% (or 4 half days) must be used for in-service training selected from the district program of courses (Appendix F). The other 50% may be designated at the building level. In either case, the principal assisted by the Faculty Advisory Council is responsible for planning the staff development in-service program with his or her faculty. Individualized in-service training on the monitoring system is designed within the monitoring relationship in cooperation with the Director of OD and Personnel.

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[5] In Section III and in the conclusion of the case study, we address the question of in what sense is the Adams County effort an OD program. There is of course, a running theme, in this report, and in the literature about 'what is OD'. We have tried to address this dilemma in the review of reviews literature (Vol. II) and will return to it in the concluding section of the report (Vol. v).

It is also important to report the direct money costs of the entire OD program. The total costs for all staff development (including bus drivers, custodians, teachers, etc.) in 1976-77 was $110,000. This covered released time, consultants, materials, travel and so on. Of this $110,000, $50,000 is allocated to buildings for their use (every school gets $500 plus 50¢ a student (interview with the Director of OD). Each building then contracts on a pay for service basis for its in-service training needs (i.e., a minimum of 50% is selected from the district array of programs, and other in-service training can be selected from any source external to the system). The other $60,000 is allocated to the Divisions and Departments of the District for all of the programs described earlier. In total, less than 1/2 of 1% of the district budget of 29 million is spent on staff development, i.e., on OD. Furthermore, it is worth stressing that 100% of the funds to support the distrct come from the district. Despite the fact that it is an intensive, comprehensive program the district has been able to carry it out without any external funds.

III. GOALS AND PURPOSES

We have already provided a description of the structure, programs and assumption of the OD program. In this section, we analyze the perceptions of goals from the point of view of the 21 people we interviewed (2 Board/Accountability Committee members, 7 central administrators[6], 5 principals and 7 teachers). This analysis will allow us to determine the degree of congruence between the official goals, and those perceived by a cross-section of district members.

There was widespread agreement among those we interviewed about the goals of the OD program. The superintendent, Dr. George Bailey said:

> "All activities were directed to the same goals, but they were not announced in advance. Also, the program was not worked out in advance. We built it as we went along. When I arrived in the district I saw stagnation. People were not proud. My major emphasis was on communications and mutual influence. OD is all encompassing and staff development is just part of it. I attempted to build a district for people who would be proud to work here. We needed to increase visibility and make people proud. The development of everyone was important to me."

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[6] In the quotations we use from central administrators in this case study, we always indicate the cases where the quote comes from the Superintendent or the Director of OD because of their central involvement in the OD program (all other quotations from central administrators are anonymous).

The Director of OD stated it this way:

> "We started with the central team by deemphasizing competition and increasing communication including making some structural change such as the integration of K-12 under one superintendent. We started low key on communication without much analysis at the beginning. In the Spring of 1974 we did a 'communication audit' from the building level. It brought forward data that said central staff does not communicate with building. As we go along there is more analysis, more training, more diagnosis than ever. The more people become knowledgeable, the more the need for training becomes clear to them."

Other central office staff expressed similar views:

> "the whole effort was directed at self-improvement. By improving management skills and overall management process, our ultimate goal of improvement for the educational process of all students would be accomplished."

> "we attempted to increase communication in order to become clear as to who does what and to move towards a team approach."

> "the main goal is to develop an effective organization. An organization that is able to operate in a humanistic manner and that is still able to accomplish its task and objectives."

> "we have two basic district-wide goals - one is toward staff growth. It is an underlying theme of all the work. Another universal theme is planned change which is organized and affects student behavior".

A community member of the accountability committee also referred to communication and involvement:

> "Our main goal is to obtain feedback from the public on particular issues. We have our PAC's spread the word in each school community, and we receive input from them, and make a report to the Board."

The five principals we interviewed stated essentially the same goals. For example:

> "When Dr. Bailey came here we were a district operating like the middle ages. Bailey wanted to modernize it without firing 3/4's of the staff, so this is why we got into OD and staff development and growth."

> "I think the goals were one of developing the administrative staff's competencies. If you are able to write your job description and set up criteria for evaluating your objective then you can be more efficient."

> "The value of human resources in terms of reaching the objectives of greater student outcome."
>
> "Everyone is expected and has a chance to grow. Our job is to predict our end result and get people to work toward it. The individual child is kept as the ultimate focus."

Teachers also referred to greater involvement and responsibility regarding performance:

> "I think they are trying to make people at all levels in the district more accountable, more responsible and aware of what they are doing. I see them making the district more fluid, more opportunity for input and for developing ideas. There is a lot of support for people to develop their own goals and objectives to meet these goals."
>
> "I think the main goals are not only developing a working plan for curriculum, but also staff development which will help people reach their potential. And it is on-going and continually feeding back into itself so there can be continuous evaluation and improvement."

And finally, one teacher referred to potential problems:

> "The goals were explained to me as finding some objectives that were concerned with staff development and continuous growth. One of the first questions from teachers was whether the evaluation was for staff development or termination. A lot of teachers at that time thought it was for termination or transfer, so there was a lot of resistance. They offered these classes and I got clarification. The jargon scared me at first such as MBO, but once I got to understand, I really enjoyed it, and got involved."

In short, the perceptions of the main goals (with some misgivings on the part of one teacher) were quite consistent across interviewees and in relation to the official goals - a blend of staff development, objectives, setting and performance criteria for improving the managerial and organizational relationships in order to increase school district morale of all staff and to have an impact on student growth and achievement.

IV. REASONS FOR SUCCESS (Facilitators of Implementation)

In Section IV and V, we describe those factors which were reported as having facilitated implementation of the OD program (IV), and those factors which people indicated were barriers or problems in achieving implementation (V). It should have become clearly evident by now that a change in superintendency and the particular qualities of the superintendent were responsible for the initiation of the change effort. He is also recognized (often in glowing terms) as the main source of ongoing support and as the man with the master conception of the development of the program.[7] Representative quotes about the skill and support of the superintendent and about other factors said to have contributed to success are stated below according to each of the three categories of interviewees.

Central Administrators and Board/Accountability Members

> "I think each of the programs have been helpful, but the emphasis on involvement at all levels in a systematic fashion is crucial. AMA is an example where top level management may get the training and keep it to themselves. But in this district it is the responsibility of the administrator to share and train others so that when we finish the cycle everyone has the same common knowledge level."

> "Board commitment and superintendent knowledge. Communication (two way) with the public to bring them along with us. This is crucial to have them know what we are doing. In general, the fostering and maintaining in all quarters, free and open communication. Finally, the particular use of OD/MBO in the moving down as closely as possible to a one to one relationship. This may be the most key thing - the monitor/monitoree. It fosters communication, trust and understanding of each other's role. Overall, the major reason for success was that there was a plan. I looked at 20 districts in MBO which were rated high by USOE, and only 2 had a comprehensive plan - that cared for people and had comprehensive plans. Most of us previously had the image that OD was just a bunch of activities. You ought to know why you are doing it. This is crucial here. Structural change was built in conjunction with needs. You can teach someone the skill, but if he doesn't have the organization that allows him to use it, it will be worse off. This district has tried to do things with multiples (2+) so they will have support, talk to one another, synergisms."

A parent member of the Accountability Committee who himself is a training specialist put it this way:

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[7] This is not to say that he is the only source of success. Clearly, the Director of OD and the programs which he is coordinating are also seen to be very important. It is to say that the superintendent is spontaneously seen as the primary mover.

> "It borders on the phenomenal, and I am a specialist. This is one of the few places that someone is putting MBO into practice. I have seen so many cases where an organization has studied MBO to death before using it. In this district it has been used to help people understand the principles of what is going on. The reason for success is that the key administration really believes in the process (MBO/OD). This kind of thing has to be generated from the top. Because George Bailey believes in it, the other central administration believes it and all the way down the line. It percolates downward. There is a strong internalization of the process. It succeeds because of the way in which it has been introduced. People have come to understand it because it has been introduced in a gradual, supportive way. The supervision is supportive, the key people help people develop themselves. The latter do the choosing and are supported. The top administrators expect results, but they are patient and trustful. They are willing to have failures, and because of this they obtain more successes."

One of the Director's summarized most of the above factors and added some others in listing six reasons:

"1) the amount of time devoted to this has been impressive.
2) the expertise we have called upon externally.
3) the expertise we have trained internally has been crucial.
4) willingness to share what they learn. It is a cascading sort of thing.
5) it is not the money we spent, but the way we spent it.
6) commitment of the top people - the Board, George Bailey is super committed and the OD director has facilitated the program."

The reference to the use of money is important regarding the role of financial resources which we analyzed in the district data in Vol. III. In Adams County, as the Director of OD states it:

> "Our financial resources are the same as those of other districts. We just use the money differently. Other districts spend the same money but focus on content, not so much on training and process."

Principals

By and large the five principals we interviewed gave similar reasons as the following comments indicate:

> "The first thing that kept it going was Dr. Bailey's style and patience. His idea was that if you don't have the expertise then we will train you. This is done in a very non-threatening way. We are striving to reach identified objectives and we are evaluating to see if we are progressing. We use things such as the SRI and AMA as tools to improve our skills. The final thing that impresses me most is that Dr. Bailey is continually striving to improve and is totally involved in the process."

> "I think the process of shared decision making is the main reason. FAC would be an example. Another example would be the Standing Committees which have representatives from every building and the district committee. There is a lot of shared decision making that goes on in these committees."

> "George Bailey: One person is responsible for all of the success. He has the total puzzle put together, but he hands out pieces that people can understand. He has completely turned the district around."

Teachers

Teachers tended to refer to programs which they had directly experienced as some of the main causes, as well as to the other factors we have just reported.

> "BASICS has definitely helped in that I am understanding how kids learn, and the sequence of learning. Also the communication with parents has been helpful. The FAC has also restructured the school. It has improved communication and involvement of the staff in decision making and working with each other."

> "The paramount thing was complete input. There were meetings where one could get clarification. The in-service changed from teaching content to emphasizing teaching the student. This year during our school time we are getting time off to take classes in BASICS to improve our teaching. It is great. If that isn't staff development, I don't know what is. It is voluntary and all teachers in my school are taking it."

Another teacher who referred to himself as more of a radical and a skeptic explained the reasons for success as based on:

> "Teacher input into everything (e.g., BASICS, Standing Committees). Seek input from the ranks from a diverse group. They invite people who are at odds with them. Also, all buildings have FAC's. It works quite well because all principals have been taking leadership training which has had beneficial results."

And another:

> "The manner in which it has been approached. There is an open invitation to all. It is not top level, but grass roots for which everyone has the support."

A fifth teacher explains the apparent dilemma between top down change and individual freedom:

> "There is tremendous pressure to participate. In-service has been set up like mad. Yet teachers have so much input as to what the goals and activities are."

A sixth teacher refers to:

> "The obvious move to hire more capable people in human relations and development. The right people have been picked to do the right job."

To summarize: By far the primary initial mover is the superintendent supported by the Board. Secondly, he not only provides general support, but is directly involved continuously in the further development of the program. Third, the systematic structuring of opportunities for communication and involvement is important. Underyling this structure is a clear conception and overall map of where the district is going, especially on the part of Bailey. Fourth, the blend of pressure for involvement with some freedom to decide on the particular goals and activities is a major factor, especially for teachers. Fifth, the selection of good, external programs and consultants in combination with internal training (multiplier approach) is beneficial for spreading knowledge and skills within the district. Sixth, focus and value placed on individual personal development in the context of the organization has facilitated the retraining of existing staff. Seventh, although retraining of existing staff has been the predominant form of staff development, a small number of strategically key new hiring and organizational changes have taken place. The hiring in 1975 of the new Director of OD who was compatible with the approach of facilitating the training of trainers, and the integration of OD and Personnel are the most obvious examples. Eighth, the gradual, incremental approach which builds on people's understanding as a precondition to further spread of the ideas, and in which the various parts of the program evolve through the adaptation and integration of mutually reinforcing and complementary components seems to account for its success at this stage. As one teacher put it - George Bailey "has the total puzzle.. but hands out pieces that people can understand."[8]

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[8] Actually, it is probably more accurate to say that Bailey was committed to certain basic goals and values on which he based his long range plan, but that the specifics (the puzzle pieces) were developed as the program evolved (see his quote on page 52).

V. PROBLEMS OF IMPLEMENTATION (Barriers)

Even with the powerful array of positive forces just described there are still some important problems being encountered in institutionalizing the OD program on a wide scale. These factors can be referred to in terms of four problems and one question:

1. The problem of time and effort
2. The problem of the perceptions and concerns of teachers
3. The problem of comprehension
4. The problem of institutionalization (the number of years for the principles to become firmly entrenched)
5. Related to 4, the question of what happens after George Bailey leaves

These five aspects reflect the common themes of the responses to our interview question concerning the problems of implementation.

Central Administrators/Board/Accountability Committee Members

> "Time - always - uneducated expectations. People move at different paces. People wonder what is this going to do to me. These have been minimized by careful explaining and training and continual follow-up communication."

> "There is the perception of some people who are not part of the process, or who are part but do not understand it, that there is a lot of time being wasted, sitting around talking about goals, organizing, etc. instead of doing things. Some people expect a product, but do not understand the process of communication. One of the problems down the line is replacing George Bailey. Is the Board going to have enough understanding of the concept and the process to select a replacement with characteristics to keep this development going?"

> "Time and the problem of identifying and understanding this complex model that has been developed".

> "Too much happens at once. You need to internalize one process before going on. The question of prioritizing has not been addressed as it might have been."

The Director of OD and Personnel discussed the time problem in perspective.

> "The biggest barrier is time. It takes more time than we think to get where we want when it will be fully operable. We have to help people overcome 1) the fear element that it will not be used against them, and 2) that it is not a burden, but a help in making their jobs more effective and satisfying. There has to be a long range commitment - 8 or 10 years - or it's more down the drain. Everyone wants a cure overnight yet we are dealing with the most complicated thing to change - human and organizational behavior". He added, "Money is not a barrier."

Principals

> "A major barrier is that OD has not got to the teachers yet. They are resistive, they think it an administrative ploy. They know it is more work. I think the majority are resistive, and a minority are gung ho. I think the majority are resisting because it is more work and they don't really understand the OD concept."

> "Anytime any form of change occurs there is reluctance - the psychological overload, myself included. Two, there was too rapid a movement over a short period of time and I think that created negative feelings."

> "Everyone is writing objectives. People are moving so rapidly that it is hard to get a sense of unity. We need more time. It takes three times as long as we think."

> "A couple of factors. It did not appear that all the central team had the same understanding. When some of us tried to write our job descriptions we were getting different information from different administrators. I am not so sure that all principals feel that all administrators are committed to it to the extent that Bailey is.

Teachers

> "Misconceptions. People not being informed. It is not a matter of supplying information, but that teachers are inundated. Many times notices go unnoticed or undigested. At the elementary level we have 30 kids and 7 subjects. It becomes lousy at times to keep up."

> "Teacher resistance to change, because the amount of change is overwhelming. People are overloaded."

> "At the beginning we didn't have the follow-through we needed. We just had in-service sessions. Then we got administrators to put together some good programs with follow-through activities."

In summary, then, by far the major problem of implementation concerns reaching the 950 teachers in the system. There are not any serious problems at the administrator level including principals, but teachers are overloaded and it appears difficult to relate to such a large group on the intensive basis necessary for comprehension and growth. At least a minority of teachers (such as those we interviewed) are strongly involved and committed to the programs, but the majority are probably not. This may be partly a result of the particular strategy and stage of the OD program, since the strategy has been to work first with administrators (1972-1974 phase), and secondly with teachers, which has only been going on intensively for two years (1975-1977) The complex, eclectic nature of the development and adaptation of a program with so many components also makes it difficult for larger groups (such as teachers) to comprehend how and if it all fits together with some common purpose. Related to the short term problem of time for involving teachers is the longer time problem and perspective suggested by the Director of OD - it takes at least 8-10 years of sustained committed effort before a reasonable level of institutionalization can be expected. Only five years had elapsed at the time of our study. The Director of OD elaborated on this issue in the following words:

> "George Bailey could leave. The School Board could change and hire a new superintendent who doesn't believe in the approach, and everything would change. Practice is not ingrained enough to make an incoming person afford not to accept it. We need five more years for the system to dictate the kind of leader who would come in."

VI. INTERNAL AND EXTERNAL CONSULTANTS

At several points we have referred to the role of consultants. Because the use of internal/external consultants was such an important question in the design of our whole study, we probed specifically about this item. We can now pull together the previous information about the use of consultants and integrate it with the responses we obtained in the interviews. We asked respondents about the characteristics of external consultants whom they found most helpful, and those least helpful.

Central Administrators

> "The district has not been reticent to spend money on external consultants to train internal people. Our overall philosophy is let's promote and train internal capability using the external consultant as providing new ideas or checking on us. An awareness shot is good, but you need an insider to follow-up. We spend more on consultants than others, but our overall budget is not larger. It is a matter of priorities."

The Board member explains the use of consultants in the following manner:

> "In our district we have one of the most intelligent uses of consultants you have ever seen. This is because we know where we want to go. So, for all the consultants we have here, we explicitly lay out our goals."
>
> "We are not interested in one-day workshops. We need specific skills developed and this is what we try to focus on."

The Director of OD and Personnel states their official policy concerning the use of external and internal consultants:

> "We will use the expertise of outside consultants to give us one of four elements: 1) if we do not have the expertise in-house, 2) provided that we don't build a dependence - we want to be able to pick it up and carry it on ourselves, 3) we look for top-notch people, but not ones who have canned programs. We want to adapt useful things, and 4) we don't make any long term commitments, so we can use more consultants. As far as internal consultants are concerned we identify people with leadership qualities who can become trainers of trainers. We are interested in expressed interest and demonstrated ability. We see the principal as facilitator of OD rather than OD leaders themselves. We have a consultant bank or inventory (in-house/external) to draw upon."

Principals

> "The main internal consultants were Dr. Guest (Director of OD) and Dr. Knight (Director of Evaluation). What was helpful was that they put the administrators into small groups so it was more personalized."
>
> "The timing and choice of external consultants has been crucial. We get the best consultants. They provide useful information and they perform. We never feel we are wasting time. Someone screens them. We have changed from a feeling of 'we have to go to a workshop' to a feeling that it is going to be worthwhile. If they are not helpful we provide feedback to the external consultants.[9]
>
> "From my experience with OD, I would say that there is no one method such as you just can't have MBO or AMA. This is the problem with consultants. They are selling only one bag of tools. You have to pick and choose what will work for you."

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[9] Every consultant is evaluated by participants using a standard "Workshop Evaluation" instrument.

> "In our country, nation-wide, there is disenchantment with education as a whole. We are bucking the national trend to date."

> "Teachers at the high school (I am on the parent advisory committee) are happy. They feel autonomous. We have the fewest dollars to spend per student in the Denver metro area (out of eleven districts) and yet the student performance is good. My impression is that we are doing better than 3 years ago, directly as a result of MBO and in-service work. People now have organizational support."

> "My expectation was that the opportunities afforded to central staff and others would improve the classroom. The dropout and absenteeism rates have improved-that is one indicator. The responsibility of staff and students would become more than an idea, but a reality. We are not there yet, but we are progressing."

> "We see an upward trend in the scores of youngsters in math and reading--there is still a problem in language arts. This trend indicates that teachers are being more efficient, they are focussing, they have more expertise."

The Director of OD referred to the following outcomes:

> "We have truly effective FAC's and PAC's. An organizational health survey also shows improvement at the central level. We also get over 5,000 teacher applications a year from outside the system for about 70 openings. People are telling us specific things as to why they want to come here."

The Superintendent talked about several results that he perceived:

> "There is better role clarification at the management level. There is better job satisfaction and an open climate. There is a tremendous difference in communication, openness and trust this year, compared to five years ago. People can talk without being worried about put downs. At the beginning five years ago this was difficult. There is probably greater teacher openness toward principals as a result of the training, but you can check that with others. Achievement levels have gone up over the last two years because of our system of teacher involvement in goals and subject matter and criterion referenced tests."

Teachers

> "The external consultants have been really exciting people giving explanations and skills. I can't think of one bad one."
>
> "All the external consultants were very helpful."

To conclude, the use of external consultants seems to be characterized by two features: 1) the best nationally qualified consultants are selected for the need at hand, and 2) the ability of the consultant to transfer his or her knowledge to potential internal consultants is paramount.

VII. IMPACT OF THE OD PROGRAM ON THE DISTRICT

Throughout the whole state of the art study we have always had in mind the question of what is the real impact of OD on school districts, especially on students. As a result we obtained both "soft" and "hard" data concerning the impact of the program on Adams County. We can divide the type of impact into two categories - changes in the organization and its staff, and changes in relation to students. Soft data on both these types of impact are based on the interviews - soft in the sense that the samples are not necessarily representative and the data are subjective. More structured, representative "harder" data come from evaluation reports, questionnaire time - line comparisons, and longitudinal data on student achievement scores.

First, let us find out from those interviewed what they said about impact. We asked each person several related questions about the indicators of impact to which they could point. We also probed specifically about possible undesirable consequences, and about consequences for students and their learning.

Central Administrators/Board/Accountability

> "The main indicators I see are: 1) improved staff morale and closer working relationships, 2) better communications between staff and community, 3) willingness on the part of staff to accept change and 4) increased student achievement in all levels (1-12). We have documented evidence that achievement levels of elementary have gone up. There were no undesirable consequences due to total involvement from the Board all the way to building level."
>
> "The district is 180° away from what it used to be. It used to be ingrown, private. Now, it is open to external impact. Team building has occurred. Horizontal working together. People are visibly working together on many fronts. I used to work with another agency and I watched this district. It is going some place. There is open communication. The best impact has been integrity. People know the opportunity for real communication is there and will be used."

Principals

"The efficiency of the operation has improved dramatically with no increase in cost. This has been judged by outside agencies. The Bonding Agency rates us high. I think their name is Kaufman. I think we all feel more autonomous in our positions with more self satisfaction. The most undesirable outcome is that it is so time consuming...There is an impact on students, but it is just beginning. That is where we are now. If I can do MBO with teachers and write performance objectives with them then it will have results for kids, but we haven't been able to do that yet because of the union."

"There are many good consequences. The autonomy I have at the local level. A good example is the budget--if we can educationally justify a decision we can use the budget any way we need. Another positive thing is that we really work on open communication and shared decision-making. I feel good about the idea that I can be critical about policy and speak my mind to Dr. Bailey, or whoever and know that I will not be reprimanded. I could carry that further and say that this is the way it works with the FAC and other audiences. One of the unexpected surprises is that I have seen the philosophy of some people change positively from a very autocratic posture to a more open shared decision-making philosophy. This has slowly moved to the teachers' level, but it is not there yet."

"In terms of the MBO the idea is super, but we cannot make it work if it does not go beyond the principal and include teachers. I would say the impact on students has been minimal, because we can't go to staff and say you are responsible for the objectives because you wrote them and validated them. This only works with those teachers that I have good rapport with and want to buy into it."

"We are at a stage right now where teachers are being involved in the process of professional growth, so the change is starting to be seen in the classroom. I think that we are at a critical point because of the teacher association. If they reject the idea it can be very detrimental. The one negative consequence--I am not sure it is a result of the OD effort, but it seems that with so many things going on, there may have been a psychological overload."

"There has been an impact at the classroom level in my school. We were the bottom school in CTBS reading scores. One year later we moved by 6 or 7 schools in reading and math. Teachers are motivated. The atmosphere of happiness and openness has changed enormously in two years. These are things that are

> directly filtering down because I feel confident in the teaching and self concept to move ahead. This is a result of training and development. I have used SRI with 50% of my teachers."

Teachers

> "As far as BASICS is concerned, it is beginning to show in better comprehension skills. I think the students can communicate and participate more with me. I don't have empirical data on this. The principal is having definite impact on the classroom through management training. The subject standing committees are good. I have worked on many of them. They are very good in promoting curriculum development. I see the problem now as the movement of professional growth from administrators down to the teaching level."

> "The biggest change in the last 5 years is more teacher involvement, more input on goals and activities. There has also been a big change in the behaviour of my principal. He has been more open to staff. More open to staff development. He changed from running a tight ship to a more collaborative one."

> "Teacher input is not mechanical. It is genuine. There is a new operating procedure of the central administration regarding this. Now there is a move to change the classroom experience. BASICS is leading to different experiences of what kids are doing in the classroom. It won't show in report cards for a long time."

> "One change is putting the right person in the right job, e.g., the Director of OD taking over Personnel. Also, my principal who took a disorganized school and organized it in two years. There is a definite structure for administrators to receive input and interaction between various levels. Even the cafeteria people seem to have better relationships with students...I feel that things are successful, but I find it hard to explain. It seems so complex, but I feel the input people have is important. There is greater affective development and use of human resources in the district."

> "It did affect the kids in my building. Getting the kids involved in the process. The BASICS program has brought a new awareness for children at all levels. We are really teaching children to think."

Parallel to the Director of OD and Personnel and under the same Assistant Superintendent there is a Director of Management Analysis and Evaluation whose division is responsible for carrying out evaluation of all of the programs of the district. We examined reports from this division in order to determine if there were more rigorous evaluative data available on the impact of the OD program. The Director of Evaluation was also one of the people we interviewed. In talking about the reports and problems he gave us a brief overview of the evaluation program of the district:

> "We have three years of data on student achievement and on the comprehensive tests of basic skills. We have also collected some attitude data, but have only done the pre-test. We haven't done the post-test. As far us evaluating the SRI results we have a person in charge of keeping track of who has taken it, and how they scored, but we haven't compared in a systematic way those who have taken it and how they are faring. As you can see it could be a major undertaking. We also do various program evaluations and management analysis. It may be a short study evaluation or a three year study examining all aspects aimed at program improvement. Management analysis is where we go into a building or department and study the operation, work load analysis, facility analysis, system analysis. We have done three departments so far, but the mandate is to do every building and department. I think that this is one of the things that has grown in the past 5 years--the need for continuous assessment. Originally, I think people were getting tired of it, but now I think they are receptive because they see things happening."

There are several evaluation reports available on particular programs--foreign language program evaluation, program reports on reading, counselling, outdoor education, junior high/middle school exemplary programs, a management analysis report on the Food Services Department and so on. We will not describe the results contained in these ad hoc reports. We were more interested in broader based evaluations. Systematic impact data on the OD programs is not yet available on a large scale--some of this is currently being collected as stated above by the Director of Evaluation. There are three reports, however, which do provide direct data--a survey of organizational health to all administrators (Appendix G.1), a survey of organizational growth (Appendix G.2), and a report entitled Student Accomplishment Indicators (Appendix G.3).

The survey of organization health conducted in January, 1977 was distributed to all principals, assistant principals, and central administrators. It does not provide longitudinal data. It does show, however, very high scores on most indicators of organizational health related to the MBO/OD program--information flow, goal focus, leadership, job satisfaction, morale, etc. Four items did not receive high scores namely, problem of overload, coordination of programs, staff meetings, and power equalization (problem solving was also relatively low). With the exception of power equalization we have already seen from the interviews that overload, coordination of all the components of the OD program and working with staff (building level) are problems in some respects. So, although the organizational health survey is not longitudinal it does lend support to the claims that the system is healthy--at least from the point of view of principals and administrators.

The data on organizational growth, again from administrators, contained in Appendix G.2, by and large confirms this picture (with the exception of central office administrators) using longitudinal data to compare 1973 results with 1977 results. Elementary and secondary school principals show many more significant gains than losses--for both groups there are 7 statistically significant positive gains compared to 3 negative differences. The same data on central office administrators is more puzzling because there are more negative changes than positive ones (5 versus 4). These findings are inconsistent with the impression we obtained from our interviews (with the single exception of the principal who referred to differences and inconsistencies from some of the central team). It is the case that the negative changes are still at the positive end of the scale (means less than 3.00), but some of the results are not what we would have predicted from the previous data--for example, an increase from 2.00 to 2.80 on item 7 (openness to the Superintendent); similarly, the increase in item 8. Other scores are consistent with the image of impact conveyed in the interviews, e.g., item 2--goal clarity; item 14--effective planning. Taking the two sets of organizational health and growth data as a whole, it seems valid to infer that there have been positive changes for principals, comparatively high degrees of satisfaction on the part of central office administrators, with some adverse effects on some of them. With such a small number (N=8) even negative changes experienced by one or two individuals could significantly effect the results of the group. In discussing this finding with the Director of OD he said:

> "We have traced this to the feeling of some that the Superintendent put more time and credence to building level input on a couple of items than to central office input. This item was lower from the buildings last year and the Superintendent was working to build up communication there. One goes up, the other goes down."

Impact on student achievement is probably the bottom line for most people in evaluating the worth of educational programs. Many of those we interviewed claimed that there were positive effects on student achievement; others stated that it was too early to tell. The achievement scores in Appendix G.3 report comparative data for each of the three years--1975, 1976 and 1977, and give us the only direct data available on student achievement. This evaluation shows that there has been very strong improvements at the grade 6 level in reading, and a moderate increase in Math--above what would have been anticipated in comparison with national norms. The changes at the grades 9 and 11 levels do not show increases for 1977. Data from criterion references tests, however, are more consistent-they show an increase in the percentage of students mastering district objectives in math and reading. The third subject area--language arts--indicates that scores have decreased relative to the national norm, especially for spelling, and especially in 1977 compared to the previous years (Appendix G.3, p. 10).

Finally, it can also be said that structural changes, (FAC's, PAC's, Subject Standing Committees, etc., etc.) seem to be well institutionalized in the district. They are working and most people report that they are working well. The Conflict Cadre has not handled very many cases yet (N=5) which could be an indicator that regular channels work effectively, or could indicate that people are not ready to utilize the services. It is probably too early to evaluate its use, which should become more clear in the next couple of years. In any case, by and large there are many structural changes which have become institutionalized and which provide systematic opportunities for communication, input and decision making in the district.

To summarize what we know and don't know about the impact of the OD program in the district after five years:

What We Know

1. There seems to be a definite positive impact on administrators in the district (especially principals, and seemingly central office administrators, although the one survey is inconsistent). The change has been toward greater goal focus, better communication and collaborative working relationships and greater morale and job satisfaction.
2. There is indirect evidence that job selection is more effective for placing the right people in the right jobs.
3. There seems to be greater communication and participation between principals and staff (FAC) and parents and schools (PAC).
4. A minority of teachers have experienced positive changes in teaching (BASICS, other curriculum development through subject committees), input in decisions at the building level and at the district level, and in overall job satisfaction. Some individual schools (see interview data from principals/teachers) seem to have experienced substantial changes, others probably not. Training programs in BASICS planned for the summer of 1978 will increase the number of teachers involved in the training to 150 (i.e., about 16.5% of the total teachers in the district).
5. Achievement levels in two of three subject areas tested have increased.

What We Do Not Know

1. There is no systematic data concerning the attitudinal and skill changes of teachers (although pre-tests have been administered, and post-tests will soon take place).
2. There is no direct evaluation data on the impact of specific OD programs--impact of SRI, AMA, etc. on subsequent performance.
3. There is no direct data on whether classroom climate and teacher/student relationships have changed.
4. There is only a very narrow and preliminary base of information on student achievement.

VIII. CONCLUSIONS

We have summarized each of the sections throughout the report, so that there is no need to repeat that information here. Rather, we have identified five critical implications which are relevant to the larger task of our study concerning the state of the art of OD.

First, two propositions recently formulated by Cohen and Gadon (1978: 75) are directly applicable to Adams County.

> "To alter leadership style from authoritarian to participative, a manager is likely to need a conceptual model that clarifies the value of changed behaviour and the means to achieve it."
>
> "In order for members of a system to share influence, they must first acquire necessary competencies, supported by structures and processes in which their skills can be applied."

George Bailey apparently does have such a conceptual model or approach which he used to clarify new directions, and to provide structures and processes to support the development of new competencies.

Second, the words that come to mind when characterizing the OD effort are *systematic*, *thorough* and *comprehensive* in the elements which are addressed. The integration of OD (in-service) and Personnel (pre-service-initial hiring criteria and training) is one example. Larger examples include the combination of simultaneously focussing on structure, task and process and their interrelationships which give the program its particular force. In fact, it can be said that OD permeates the entire system and its activities. It is part and parcel of multiple other innovations in curriculum, gifted talented programs, personnel decisions and so on. As indicated in the questionnaire, the OD work has caused many other changes to take place because of its close relationship to all major programs in the district. Further, OD has a *direct education task focus.* In short, OD is fundamental to the district work, not an add-on program as is the case in many uses of OD in other school districts.

Third, within this comprehensiveness is the ability to retain a dual focus on the *organizational* level of change (structure, role clarification, objectives setting, criteria of performance) and on the development of *individuals* (personal growth, monitor/monitoree) that enables OD to occur without losing sight of the individual, personal development *and* without neglecting the system as a whole.[10] Too many system based programs run the risk of neglecting or losing sight of the individual. It is instructive to note that when the Director of OD was asked to rank order the levels of focus of OD activities, he ordered them as follows: 1= personal (individual); 2= Group or team; 3=role; and 4=whole district (questionnaire data). The primary emphasis on the individual within a system context seems to be a particularly effective combination.

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[10] Incidentally, it is the focus on individual and human resource development and processes in relation to objectives setting and performance criteria that makes the effort more than an MBO program, that is, makes it an *OD* program.

Fourth, one of the most revealing lessons, we think, concerns the assumptions behind and the nature of use of external OD programs and ideas. The multiplier approach for training internal capacity is crucial. The adaptation and mutually reinforcing use of several programs is another major feature. However, we would suggest that by far the most important implication of the case does not concern the techniques or programs themselves (even the adaptations and particular combination which has evolved), but the values and conceptual assumptions which underly their use in the district. As many of the interviews indicate, Bailey and others do seem to have some fundamental principles and assumptions on which they systematically base their decisions. If the techniques or programs per se were seen as a major reason for whatever success has occurred, it would be a misleading lesson. The same programs could be used in other instances in radically different ways. In fact, the MBO approach to OD appears to be particularly susceptible to misuse in that the explicit use of objectives, criteria of performance, assessment of the qualities of all those hired and promoted, etc., have an evaluative tendency which can be counterproductive to open communication, trust, morale and individual development, i.e., some of the essential elements of OD. Because of these dangers, it is not the " espoused values" (e.g., "objectives setting and criteria performance data in this district will be used in a non-evaluative way") that will count, but the "values in use" (see Argyris and Schon, 1974). George Bailey has stated his value position from the beginning, but it has been by implementing these values in a day to day manner that he seems to have had the most impact.

We are saying something more complex than suggesting that values and action be consistent. We are saying that because the perceptions of people (especially when large groups are involved) will influence their actions, and because the purpose and use of OD is complex, it is necessary to work continually at problems of communication and supporting participation, if the program is to be seen as a clear example of "values in use" and not just "espoused". The interview data indicate that Bailey and others have worked continuously and intensively on these issues.

Fifth, we finally see in detail how long it takes to institutionalize OD in a school district. Even with what seems to be a very large number of favourable conditions--a school district without major urban problems or political unstability, a supportive Board, a supportive and conceptually sound superintendent, the use of systematic structures to facilitate communication and involvement, the use of many external ideas and programs, tremendous effort and time, careful attention to task, process and structure and to individual as well as organizational issues, an incremental strategy, etc.--the program is still not nearly institutionalized at the building level after five years. If it does take 10 years, it might be somewhat discouraging to remind the reader that it is not the passage of time, per se, that counts, but the ten years of constant, systematic work. How many school districts would have the combination of circumstances and the stability to carry out such a sustained, intensive effort? On the other hand, it may be the only way to go. In the words of the Director of OD:

> "OD will only be successful, if people come to realize that success will only come if the people are successful. We spend more money on the maintenance and repair of buildings than on the maintenance and repair of people. There has to be an understanding and commitment to that concept. OD has two legs--structure and human."

Adams County certainly seems to be spending an enormous amount of energy on the maintenance and development of its people. There is little doubt that the county will continue this effort. The main reason for its strength, according to the Director of OD, is that it is integrated with the basic functioning of the district:

> "It is specifically related to all changes and activities of the district." (questionnaire)

Concerning the prediction for the future of OD in Adams County he stated:

> "It will continue to function and will have an ongoing influence on the functioning of the district - it will become more important." (questionnaire)

It is impressive that virtually all of this has been done using only internal district money, and ordinary amounts at that. The case study should provide hope for other districts that OD can be done with considerable success, but it's a great deal of work.

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APPENDICES

Appendix A.	Management Approach, School District No. 12
Appendix B.	Chronology of Organizational Development, School District No. 12.
Appendix C.	Organizational Development Activities
Appendix D.1	Administrator Perceiver Themes
Appendix D.2	Basic Beliefs of SRI Perceiver Academies
Appendix E.1	District Priorities: 1975-78
Appendix E.2	Management Through Objectives
Appendix E.3	The Individual Quarterly Review
Appendix F.	District Inservices - 1976-1977
Appendix G.1	Survey of Organizational Health
Appendix G.2	Survey of "Organizational Growth" Results
Appendix G.3	Student Accomplishment Indicators

Appendix A

MANAGEMENT APPROACH SCHOOL DISTRICT NO. 12 **(Produced by the District)**

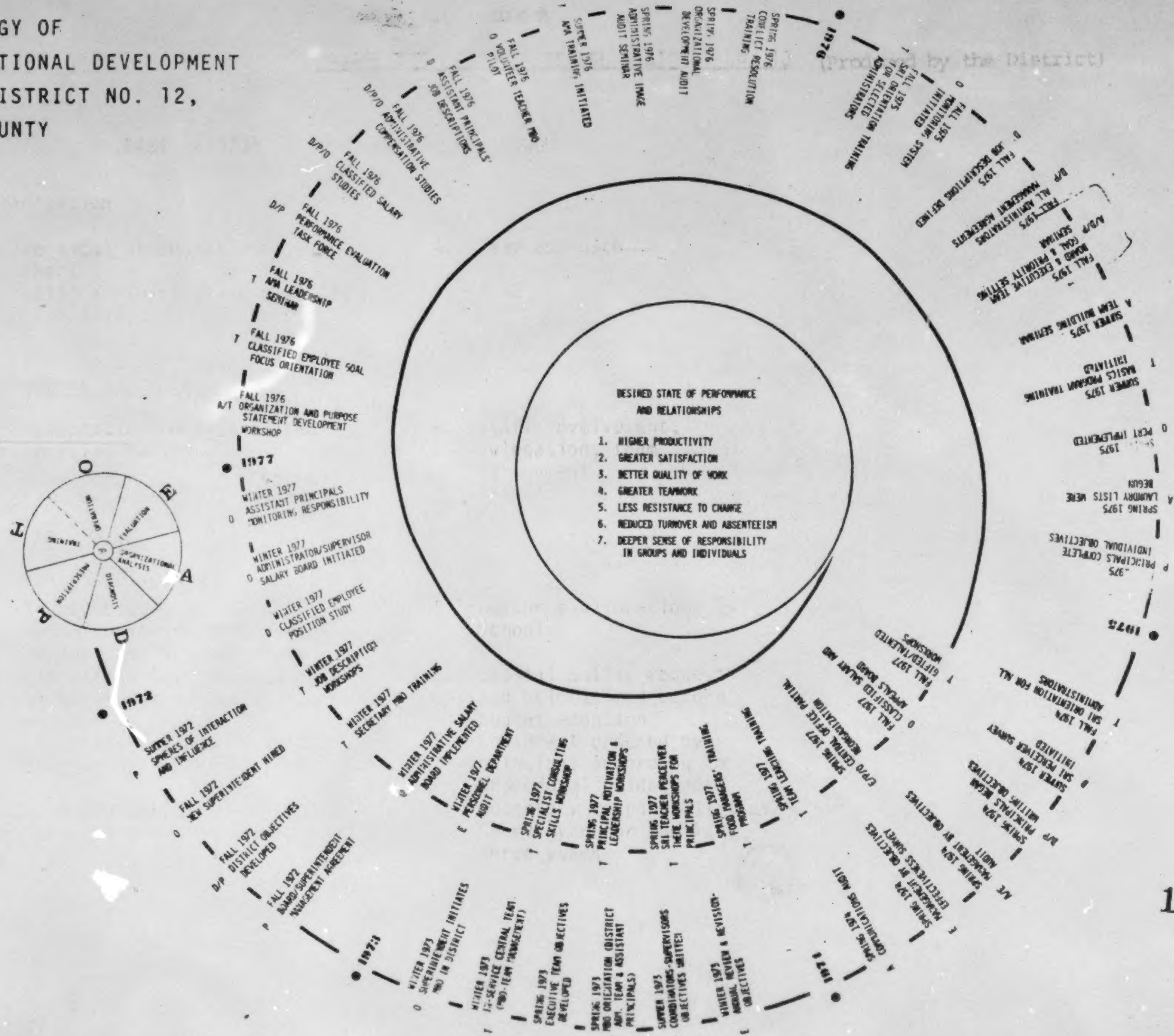
PAST (1973)	NOW
I. Organization	
A. Vertical organizational chart	A. Team approach
B. Split administrative planning (K-6/7-12)	B. K-12
II. Management Approaches	
A. Autocratic and centralized decision making	A. Staff involvement, delegation, team management
B. Communication largely downward	B. N+1
C. "Flying-by-the-seat-of-our pants" on budget	C. Prioritized Budget: Budget based upon cost analysis and "grass root" requests
D. Yearly budget based on recommendations of Superintendent and his secretary	D. Resource allocations by school
E. Capital outlay projects only on an emergency basis	E. Capital outlay requests and prioritized before budget adoption
F. Equipment for new buildings ordered by Superintendent	F. Equipment ordered by principal according to procedural guidelines
G. $250,000 deficit	G. Budgetary responsibilities Carry-over for the last three years

SD12
June/1977

PAST (1973)	NOW
III. Classroom Approaches	
A. Curriculum priorities defined through textbook adoption	A. Curriculum priorities by subject areas
B. Instructional skills developed via textbook consultants, university offerings and occasional outside expertise	B. In-district instructional skills development program with emphasis on basic teaching and learning strategies
C. Instructional objectives written in most subject areas as a result of accountability	C. Instructional objectives validated in areas of reading, math, language arts, and social studies by 70% of staff
D. Standardized testing only. Used primarily for national norm comparisons	D. Student testing via PCRT in reading, math & voc/tech and CTBS. Results analyzed by student, classroom and district expectancies
IV. Personnel	
A. Administrative appointment by Superintendent and Board	A. Administrative Selection via job description, SRI and committee involvement
B. Teacher selection and assignment via Superintendent/Assistant Superintendent	B. Qualifications prioritized by Director of Personnel selected by principal/staff. Selection via SRI committee involvement and instructional needs
C. Few job descriptions	C. Administrative job descriptions

PAST (1973)	NOW
V. Role of the Board of Education	
A. Legislative, executive, judicial	A. Legislative and some judicial
B. Unclear and uncertain policies forced Board into administration	B. Policy and procedures handbook (Professional Policies Council) no need for involvement in administration
C. Brief and "loose" agenda; little or no background information to Board before meetings; no information to visitors; legislated policies as per decision	C. Board packets - sent to Board, administrators, and schools before each meeting. Ample and appropriate information necessary to function. Elimination of "straw alternatives"

CHRONOLOGY OF ORGANIZATIONAL DEVELOPMENT SCHOOL DISTRICT NO. 12, ADAMS COUNTY


O
E
A
D
P
J
TRAINING
MONITORING
EVALUATION
ORGANIZATIONAL ANALYSIS
DIAGNOSIS
PRESCRIPTION
DESIRED STATE OF PERFORMANCE AND RELATIONSHIPS
1. HIGHER PRODUCTIVITY
2. GREATER SATISFACTION
3. BETTER QUALITY OF WORK
4. GREATER TEAMWORK
5. LESS RESISTANCE TO CHANGE
6. REDUCED TURNOVER AND ABSENTEEISM
7. DEEPER SENSE OF RESPONSIBILITY IN GROUPS AND INDIVIDUALS
1972
P SUMMER 1972 SPHERES OF INTERACTION AND INFLUENCE
O FALL 1972 NEW SUPERINTENDENT HIRED
D/P FALL 1972 DISTRICT OBJECTIVES DEVELOPED
P FALL 1972 BOARD/SUPERINTENDENT MANAGEMENT AGREEMENT
1973
O WINTER 1973 SUPERINTENDENT INITIATES MBO IN DISTRICT
T WINTER 1973 IN-SERVICE CENTRAL TEAM (MBO-TEAM MANAGEMENT)
P SPRING 1973 EXECUTIVE TEAM OBJECTIVES DEVELOPED
T SPRING 1973 MBO ORIENTATION (DISTRICT ADM. TEAM & ASSISTANT PRINCIPALS)
D/P SUMMER 1973 COORDINATORS-SUPERVISORS OBJECTIVES WRITTEN
E WINTER 1973 ANNUAL REVIEW & REVISIONS-OBJECTIVES
1974
A SPRING 1974 COMMUNICATIONS AUDIT
E SPRING 1974 MANAGEMENT BY OBJECTIVES EFFECTIVENESS SURVEY
A/E SPRING 1974 MANAGEMENT BY OBJECTIVES AUDIT
D/P SPRING 1974 PRINCIPALS BEGAN WRITING OBJECTIVES
D SUMMER 1974 SRI PERCEIVER SURVEY INITIATED
T FALL 1974 SRI ORIENTATION FOR ALL ADMINISTRATORS
1975
P 1975 PRINCIPALS COMPLETE INDIVIDUAL OBJECTIVES
A SPRING 1975 LAUNDRY LISTS WERE BEGUN
O SPRING 1975 PERT IMPLEMENTED
T SUMMER 1975 BASICS PROGRAM TRAINING INITIATED
A SUMMER 1975 TEAM BUILDING SEMINAR
A/D/P FALL 1975 BOARD & EXECUTIVE TEAM GOAL & PRIORITY SETTING SEMINAR
D/P FALL 1975 ALL ADMINISTRATORS MANAGEMENT AGREEMENTS
D FALL 1975 JOB DESCRIPTIONS DEFINED
O FALL 1975 MONITORING SYSTEM INITIATED
T FALL 1975 SRI ORIENTATION TRAINING FOR SELECTED ADMINISTRATORS
1976
T SPRING 1976 CONFLICT RESOLUTION TRAINING
A SPRING 1976 ORGANIZATIONAL DEVELOPMENT AUDIT
D/P SPRING 1976 ADMINISTRATIVE IMAGE AUDIT SEMINAR
T SUMMER 1976 APA TRAINING INITIATED
O FALL 1976 VOLUNTEER TEACHER MBO PILOT
D FALL 1976 ASSISTANT PRINCIPALS' JOB DESCRIPTIONS
D/P/O FALL 1976 ADMINISTRATIVE COMPENSATION STUDIES
D/P/O FALL 1976 CLASSIFIED SALARY STUDIES
D/P FALL 1976 PERFORMANCE EVALUATION TASK FORCE
T FALL 1976 APA LEADERSHIP SEMINAR
T FALL 1976 CLASSIFIED EMPLOYEE GOAL FOCUS ORIENTATION
A/T FALL 1976 ORGANIZATION AND PURPOSE STATEMENT DEVELOPMENT WORKSHOP
1977
O WINTER 1977 ASSISTANT PRINCIPALS MONITORING RESPONSIBILITY
O WINTER 1977 ADMINISTRATOR/SUPERVISOR SALARY BOARD INITIATED
D WINTER 1977 CLASSIFIED EMPLOYEE POSITION STUDY
T WINTER 1977 JOB DESCRIPTION WORKSHOPS
T WINTER 1977 SECRETARY MBO TRAINING
O WINTER 1977 ADMINISTRATIVE SALARY BOARD IMPLEMENTED
E WINTER 1977 PERSONNEL DEPARTMENT AUDIT
T SPRING 1977 SPECIALIST CONSULTING SKILLS WORKSHOP
T SPRING 1977 PRINCIPAL MOTIVATION & LEADERSHIP WORKSHOPS
T SPRING 1977 SRI TEACHER PERCEIVER THEME WORKSHOPS FOR PRINCIPALS
T SPRING 1977 FOOD MANAGERS' TRAINING PROGRAM
T SPRING 1977 TEAM LEADERS TRAINING
E/P/O SPRING 1977 CENTRAL OFFICE PARTIAL REORGANIZATION
O FALL 1977 CLASSIFIED SALARY AND APPEALS BOARD
T FALL 1977 GIFTED/TALENTED WORKSHOPS

GB:jr
[redacted]anu[redacted]. [redacted]3

ORGANIZATIONAL DEVELOPMENT SYSTEM

BOARD OF EDUCATION	SUMMER	1972
NEW SUPERINTENDENT HIRED	FALL	1972
SUPERINTENDENT INITIATES MBO IN DISTRICT	FALL	1972
DISTRICT OBJECTIVES WRITTEN	FALL	1972
SUPERINTENDENT'S OBJECTIVES WRITTEN	FALL	1972
IN-SERVICE CENTRAL TEAM (MBO-TEAM MANAGEMENT)	FALL	1972 & SPRING 1973
CENTRAL TEAM OBJECTIVES WRITTEN	WINTER	1972 & 1973
COORDINATORS-DEPT. ADMINISTRATOR'S OBJECTIVES WRITTEN	SUMMER	1973
ANNUAL REVIEW & REVISION-OBJECTIVES	DECEMBER	1973
CONSULTANT, DR. STEPHEN J. KNEZEVICH MANAGEMENT BY OBJECTIVES AUDIT AUDIT OF INTENT: STRATEGIES, TRAINING, OPERATION	SPRING	1974
CONSULTANT, O.A. BUD HAM/DONALD WARSAVAGE COMMUNICATIONS AUDIT AND MBO EFFECTIVENESS SURVEY SURVEY DISTRICT STRENGTHS AND WEAKNESSES IN ADMINISTRATION PRACTICES AND SUGGESTED CHANGES	SPRING	1974
PRINCIPALS BEGIN WRITING OBJECTIVES	SPRING	1974
SRI PERCEIVER SURVEY INITIATED	SUMMER	1974
PRINCIPALS COMPLETE PROJECT OBJECTIVES	FALL	1974
PRINCIPALS COMPLETE INDIVIDUAL OBJECTIVES	SPRING	1975
LAUNDRY LISTS BEGUN	SPRING	1975
PCRT IMPLEMENTED	SPRING	1975
BASIC PROGRAM TRAINING	SUMMER	1975
CONSULTANT, CARL NEU GOAL SETTING BOARD OF EDUCATION AND EXECUTIVE TEAM GOAL AND PRIORITY SETTING FOR DISTRICT ORGANIZATION	FALL	1975
CONSULTANT, RICHARD FOSTER TEAM BUILDING/ORGANIZATION ANALYSIS GOAL SETTING DISTRICT ADMINISTRATORS SEMINAR	FALL	1975
PRINCIPALS COMPLETE PERSONAL OBJECTIVES	FALL	1975
JOB DESCRIPTIONS DEFINED	FALL	1975
MONITORING SYSTEM IS INITIATED	FALL	1975
ORGANIZATION OF STANDING CURRICULUM COMMITTEES	FALL	1975

CONFLICT RESOLUTION CADRE		SPRING	1976	
CONSULTANT, C. BROOKLYN DERR ORGANIZATIONAL DEVELOPMENT AUDIT		SPRING	1976	
CENTRAL OFFICE PARTIAL REORGANIZATION		SPRING	1976	
ADMINISTRATIVE IMAGE AUDIT SEMINAR		SPRING	1976	
ARTHUR YOUNG & COMPANY, CONSULTANT ADMINISTRATION POSITION CLASSIFICATION CLASSIFICATION AND COMPENSATING STUDY		FALL	1976	
AMA PROGRAM INITIATED		FALL	1976	
TEACHER MBO PILOT		FALL	1976	
ASSISTANT PRINCIPALS' JOB DESCRIPTIONS		FALL	1976	
CERTIFICATED AND CLASSIFIED SALARY STUDIES		FALL	1976	
PERFORMANCE EVALUATION DEVELOPMENT		FALL	1976	
EXTERNALLY BASED STAFF ORIENTATION TO ADMINISTRATION CENTER		FALL	1976	
AMA LEADERSHIP SEMINAR		FALL	1976	
CLASSIFIED EMPLOYEE GOAL FOCUS ORIENTATION		FALL	1976	
ORGANIZATION AND PURPOSE STATEMENT DEVELOPMENT WORKSHOP		WINTER	1976	
ASSISTANT PRINCIPALS MONITORING RESPONSIBLITY		WINTER	1976	SPRING 1977
CONSULTANT, GENE NELSON CLASSIFIED EMPLOYEE POSITION STUDY POSITION CLASSIFICATION	January	WINTER	1977	
PERSONNEL EVALUATION TASK FORCE	January	WINTER	1977	
JOB DESCRIPTION WORKSHOPS		WINTER	1977	
SECRETARY MBO TRAINING		WINTER	1977	
ADMINISTRATIVE SALARY BOARD AND APPEALS COMMITTEE		WINTER	1977	
CONSULTANT, FRANK IVES PERSONNEL DEPARTMENT AUDIT AUDIT OF PROCEDURE, ACTIVITIES, AND SERVICES		WINTER	1977	
CONSULTING SKILLS WORKSHOP		SPRING	1977	
MOTIVATION AND LEADERSHIP WORKSHOPS		SPRING	1977	

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Northglenn, CO 80233

ORGANIZATIONAL DEVELOPMENT ACTIVITIES

Gifted and Talented (research/program planning)

Leadership Development (AMA)

Food Services Manager Training

Custodian Training/Head Custodian Leadership Training

Bus Driver Training

BASICS - Teaching/Learning Strategies

Conflict Resolution Cadre

Secretary Inservice (office climate, TA)

Administrator Perceiver (SRI)

Teacher Perceiver (SRI)

Communication Skills

MBO - Administrators

MBO - Teachers

Learning Model Development

Management Agreements

Positive Employee Discipline

Criterion Reference Testing

Staff Development - Mildly Handicapped Students

Position Description Development/Objectives/Standards of Performance

Goal Setting/Prioritizing

Climate Improvement - Local and State Workshops

HG:lh
12/29/77

SRI TEACHER PERCEIVER THEME WORKSHOPS FOR PRINCIPALS	SPRING	1977
FOOD MANAGERS' TRAINING PROGRAM	SPRING	1977
TEAM LEARNING TRAINING	SPRING	1977
CENTRAL OFFICE PARTIAL REORGANIZATION	SPRING	1977
CLASSIFIED SALARY AND APPEALS BOARD	FALL	1977

HG:jr 12/77

Appendix D.1

ADMINISTRATOR PERCEIVER THEMES

1. **MISSION** - Mission is represented by one's personal commitment in terms of making an affirmative impact upon the lives of others. The educational manager with mission has a real sense of purposiveness in wanting to make a direct and significant difference in the lives of his staff. This manager believes that staff members can grow and develop. This person is primarily concerned with a cause that can be of benefit to others, which will in turn provide significance to one's own life; rather than being concerned with symbolic evidence of this person's importance obtained through certain status symbols.

MANPOWER DEVELOPMENT - Manpower Development is indicated by the manager's ability to receive satisfaction from the personal and professional growth of staff members. This person helps teachers experience success and finds fulfillment in this achievement of the teacher's goals. This is in contrast to the manager who performs directly to achieve satisfaction.

RELATOR - The relator is evidence when the manager desires to and does have strategies to build relationships with the staff. This person expresses feelings and thoughts openly and encourages others to do likewise. This manager is committed to an extended and enduring relationship of mutual support.

DELEGATOR - A delegator extends responsibility to associates within the parameters of developing an educational growth climate. This person knows each teacher's strengths and interests and delegates appropriately so that each teacher grows and is successful.

ARRANGER - An arranger perceives the interrelatedness among people, objects and situations. This person tends to put people and things into configurations that achieve the educational objectives of the school. Arrangers show organizational ability or skill, and display synergistic thinking.

CATALYZER - The catalyzer is a manager who can stimulate the performance of teachers through personally being creative, innovative and enthusiastic. This individual searches out and encourages these aspects within individual faculty members.

AUDIENCE SENSITIVITY - An audience sensitive manager spontaneously assesses actions and proposed actions from the viewpoint of patrons faculty and students. This person is sensitive to the attitudes, thoughts and feelings of the various audiences and uses this insight in the decision-making process.

GROUP ENHANCER - The group enhancer holds the view that their particular staff is best. This person looks for the strengths in their staff and has a positive perspective toward them. This manager builds pride through the accomplishments of their staff and plans ways to maintain a supportive group climate.

DISCRIMINATOR - The discriminator is a manager who differentiates according to a highly structured value system. This person tends not to impose their values on others but is characterized by an ability to identify priorities.

10. PERFORMANCE ORIENTATION - The performance orientation theme is observed in an administrator who is goal directed. This person's goals are stated in terms of specific "practical" outcomes for self and others. This person uses criteria for measurements, has definite objectives and is interested in measurable results.

11. WORK ORIENTATION - A manager with work orientation tends to be totally involved in the work and is almost continuously thinking about it. This person tends to rehearse and review activities related to work family and special interest commitments during periods of less direct involvement. This person possesses a great deal of stamina and ordinarily spends long work hours. An educational manager's work orientation reflects spontaneous interest in co-workers.

2. AMBIGUITY TOLERANCE - The manager displays a tendency to suspend judgment until as much evidence as possible is available. A high tolerance for ambiguity exists with much restraint placed upon impulsive decision making.

BASIC BELIEFS OF SRI PERCEIVER ACADEMIES

"Dedicated to the Selection and Development of Educational Talent"

erceiver Academies predicates its work upon the following basic assumptions:

Underlying Assumptions About Human Beings

1. We believe people possess tremendous potential much of which is unidentified and unused.
2. We believe people have the capacity to contribute to the lives of others in positive ways. They are honest, caring and loving with a desire to do good for others.
3. We believe some people as a result of their inate characteristics and life experiences have a greater capacity to be helpful to others.
4. We believe that individuals are their own best single authority on themselves and therefore to identify helping characteristics of people we need simply to ask them.
5. We believe it is possible to affirm and develop helping characteristics in people which allow for greater helpfulness to others.
6. We believe outstanding helping people in every vocational area have similarities of strengths which when studied can provide a valid basis for predicting success of others choosing to enter that particular vocational area.

Underlying Assumptions About Educators

1. We believe that our greatest contribution to mankind is to be sure there is a teacher is every classroom who cares that every student every day learns and grows and feels like a real human being.
2. We believe the most effective way to continue the development of teachers within the educational institution is through the selection of administrators who can make the most positive impact upon the lives of others.
3. We believe the most important task of an educational institution is to continue the development of all the human resources within the organization.
4. We believe that best way to assist in the development of professionals is on an individual basis within an organization of people committed to the development of each other.

C. Underlying Assumptions Regarding Skill Development

1. We believe it is possible to predict the attitudes and behaviors of an individual through a thoroughly researched, structured, stress-free interview.
2. We believe it is possible to help administrators within local educational institutions to become increasingly perceptive of teachers and administrators through the use of the structured, stress-free interview process.
3. We believe it is possible for administrators within educational institutions to enact personalized growth plans for each staff member as a result of the use of the interview process.

D. The Mission

The mission of SRI Perceiver Academies is to train professionals responsible for the selection and development of others to become more skillful in reaching their human development objectives.

This mission is being accomplished through:

Teacher Perceiver Academy

Administrator Perceiver Academy

Teacher and Educational Manager Selection Services

Consultant Services

Professional Development Workshops

Special Comprehensive School Research and Development Programs

The professional associates directly involved in SRI Perceiver Academies are:

Donald O. Clifton, Ph.D.
Victor A. Cottrell, D.Ed.
Kenton R. Hill, M.A.
Jo Ann M. Miller, M.A.
Roger D. Moore, B.S.
Gale D. Muller, Ph.D.
William J. Preuss D.Ed.
Connie A. Rath, M.A.

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Denver, Colorado 80233

October 30, 1975

DISTRICT PRIORITIES: 1975-78

STUDENT CENTERED:

1. SKILL DEVELOPMENT
    - Basic Skills
    - Learning Skills
    - Voc Ed/World of Work
    - Quality of Work

2. CITIZENSHIP/SELF-DIRECTION AND CONTROL
    - Alienation
    - Discipline
    - Drop-Out
    - Vandalism

3. ACHIEVEMENT
    - Reading
    - Math
    - Spelling
    - English
    - Gifted

DISTRICT PRIORITIES: 1975-78

MANAGEMENT CENTERED:

1. MANAGEMENT BY OBJECTIVES
   - 1.1 Organizational Development
     - Role Definition and Clarification
     - Time Management
   - 1.2 Educational Program Development
     - Program Objectives/Continuity
     - Instructional Objectives
     - Classroom Objectives

2. MANAGEMENT INFORMATION SYSTEM

   VARIABLES:
   - Student Information
   - Personnel Information
   - Program Information
   - Resources Information

   ACTIVITIES:
   - Collecting
   - Evaluating
   - Projecting
   - Deciding
   - Reporting

3. HOME-SCHOOL RELATIONS
   - Publics' Image of School System
   - Parent Volunteer Program
   - Parent Training Program

E-1

DISTRICT PRIORITIES: 1975-78

ORGANIZATION CENTERED:

1. COHESIVENESS
   - DEVELOP CONGRUENCY BETWEEN PERSONAL GOALS AND THOSE OF THE DISTRICT.
   - DEVELOP UNDERSTANDING OF "UPWARD" MISSION.

2. COMMUNICATION
   - DEVELOP UNDERSTANDING OF EFFECTIVE COMMUNICATION.
   - DEVELOP AND REFINE ONE-TO-COMMUNICATION SKILLS.

3. ROLE AND FUNCTION CLARIFICATION
   - (INCLUDED IN MBO SECTION)

4. STAFF DEVELOPMENT
   - (INCLUDED IN MBO SECTION)

SD12 ADCO
10/30/75

Appendix E.2

SCHOOL DISTRICT NO. 12, ADAMS COUNTY (from Bailey, 1977) ROLE CLARIFICATION #4
11285 Highline Drive Organizing
Northglenn, Colorado 80233

MANAGEMENT THROUGH OBJECTIVES

October 6, 1975

Basic Assumptions Concerning the Monitoring Process

1. All District Administrators will be assigned a Monitor by the Superintendent before October 15, 1975.

2. Thereafter the Monitor and Monitoree shall become a team and will begin the process (as attached) as soon as possible in order to Complete a District Management Performance Agreement before January 1, 1976.

3. During the process herein defined the Monitor shall be the immediate supervisor for helping the Monitoree reach his objectives. However, for all other job responsibilities of the Monitoree, the immediate supervisor is dictated by the District job descriptions.

4. Monitorees will develop approximately 6 - 8 objectives for refinement and inclusion in a District Management Agreement. (see attachment)

5. Continued communication and reporting procedures will quite likely be numerous and informal; however, the Monitoree or the Monitor has the prerogative of requesting a formal quarterly review of attainment of objectives.

6. Definitions of concepts within the process:

   6.1 Monitor - person(s) who watches, oversees, observes, and/or appraises programs/personnel to determine if they are operating as planned.

   6.2 Monitoree - the person(s) being monitored.

   6.3 Laundry List - an itemized list of all routine tasks that are accomplished by a person. These tasks include all repetative actions.

   6.4 Function - a general statement of outcome depicting the purpose one has for working in a system. Conceptual in nature, it answers the question: "What is the purpose of my job?"

   Planning
   Organizing
   Communicating
   Directing
   Evaluating

6. Definitions (continued)

6.5 Mission - a mission is a universal, continuing purpose that provides a broad sense of direction through time. It is general to a wide area of functions and relations, and provides direction to a range or set of corresponding objectives.

Upward Mission - Assisting Superordinate(s)
Downward Mission - Assisting Subordinate(s)
Horizontal Mission - Assisting Peer(s)

6.6 "Helpers" - those persons providing assistance to the monitoree in achieving his/her objectives.
Those persons providing assistance to the monitor in judging the appropriateness and quality of the monitoree's products.

6.7 Appraise - to identify, analyze, define and place a value upon some item or variable.

6.8 Criteria - the standard by which something is judged. (How well something is to be done -- as judged by whom or what.)

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Denver, Colorado 80233

Appendix E.3
(from Bailey, 1977)

April 5, 1976

THE INDIVIDUAL QUARTERLY REVIEW

There must be individual quarterly appraisals under the system of management-by-objectives just as there should be quarterly unit revisions against yearly set goals. The individual quarterly reviews of progress should begin shortly before the quarterly unit review is made.

The individual quarterly review takes place on a dyadic (one-to-one) basis between monitoree and his immediate monitor in a private review of progress session. Each should allow at least 1 hour for this conference. No one in management should be excluded from the process.

The process begins with key administrative officers meeting individually with all those reporting directly to them - and so on up the line until every single employee in the system (nonacademic as well as academic!) has had a quarterly review of progress toward agreed upon objectives with their monitor. When these sessions have been completed, the chief executive meets in individual sessions with all those administrators (and his secretary) who report directly to him. It ends with the chief executive and his board of trustees in executive session.

The quarterly review is not used as an evaluation of the individual. Rather, it is primarily used as a facilitating method toward achieving agreed upon system and institutional goals and unit and individual objectives. It is objective in nature, for the quarterly review of progress toward achieving agreed upon objectives limits itself strictly to the signed MBO Agreement.

Before monitor and monitoree sit down together for the quarterly review of progress session, the monitoree is asked to complete the Quarterly Review of MBO Agreement except for "Suggestions Agreed to for Overcoming Obstacles" and to return 1 copy to the monitor upon completion. This saves the time of each. It forces the monitoree to think about his progress and any obstacles he has encountered which resist achievement of agreed upon objectives. Likewise, it provides the monitor with advance information so that the conference time is not wasted on going over ground that has not been carefully thought through. A conference that is well planned makes for better use of previous time and usually assures a better result. The monitor, thus, sets a mutually agreeable review time after he has had the opportunity to study his monitoree's quarterly report.

Though the one-to-one formal quarterly conference serves as a review of results to date session, this is not its main purpose. Its main purpose is to solve problems blocking the achievement of agreed upon objectives.

Reviewing results to date has a salutory effect on an organization. Few individuals like to be placed in a position where they have to admit that little or no results have occurred which have been within the power of the individual to achieve. Thus, just knowing that a review of progress is to occur quarterly helps to reduce procrastination which as often as not becomes "permanent" under most of education's "common sense" system of administration.

Solving problems which are blocking desired results is usually where MBO, and its component part of quarterly reviews, most effectively manifests itself. In this situation, the monitor has an important, or more important, a role than the monitoree. His responsibility is to serve as "teacher," "coach," and "blocking back" all wrapped up in 1 person.

monitor must really study the quarterly review and listen to what his monitoree is saying. In this teacher role, he must be Socratic in method and carefully think through just the right, analytical questions to ask so as to hopefully provide the subordinate with fresh insights towards overcoming his obstacles. As coach, the monitor must advise and direct his monitoree as to what must be done to overcome any problems the monitoree is facing which is militating against realization of objectives. As blocking back, the monitor must always ask 2 questions of each monitoree 1) "What can I do to help you to succeed?" and 2) "What must I stop doing to help you to succeed?"

Each role of the monitor - teacher, coach, and blocking back -in the quarterly review session is important, but accountability squarely falls upon the monitor's shoulders in his role as "blocking back." This may require obtaining additional financial or human resources - or both. It may require modifying an objective downward. It may require abandoning the objective all together. In this respect, any changes to the original "game plan" calls for MBE. Often this requires agreement up the hierarchy as well.

The other side of the blocking back role of the monitor may be to stop (!) doing certain things he now is doing which interferes with the monitoree achieving his individual objectives.

In summary, interferring behavior by monitors can be as much a cause for militating against the achievement of goals and objectives as their failure not to provide supportive help of teaching, coaching and requisite material and human resources. This requires the monitor to ask the question, "What must I stop doing to help you to succeed?" Conversely, the monitoree has the responsibility to candidly answer this question.

Adopted from
Hostrop, Richard W., Managing Education For Results. (Homewood, Ill.: ETC Publications, 1975).

SD12 ADCO

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Northglenn, CO 80233

DISTRICT INSERVICES - 1976 & 1977

Winter, 1976

Art Inservice - Clay
Games, Gadgets and Gimmicks for Special Ed. Media Specialists
Improving Teacher Effectiveness with the Learning Disabled Child
Foundations for Mathematics
Lindamood Auditory Conceptualization Test Inservice
Investigating Volunteer Programs - Library Media Specialists
K-12 Media Skill Committee Inservice
Outdoor Education Inservice
Auditory Discrimination in Depth
Metric System
Teacher/Parent Effectiveness
Computer Programming
Language Arts Workshops

Spring, 1976

Adaptations of the Learning Center Concept
Summarizing Task Force Committee Responsibilities
Spanish Lessons
Organization and Time Management for the Classroom Teacher
Colorado History Project Inservice
Secretaries Inservice (120)
Administrator Workshop
BASICS B (4)
Special Education Individualizing Instructional Methods
Beyond Mainstreaming
Mini-courses
Career Education Workshop
Berkeley Health 6th Grade Unit
Metric System Workshop
Basic Photography Class

Summer, 1976

Secretarial Inservice "Briefing and Tour of New Administration Center"
Business Services

Fall, 1976

Creative Writing Workshop
Calculus Refresher Workshop
Home Economics Workshop
Hand-held Calculator Program

Fall, 1976 continued

Working with Learning Disabled and Behaviorally Problem Students
String Workshop (Music) (7)
Diagnostic and Evaluation
Teaching in a Second Language in the Elementary Schools
Spanish Language Class
Career Education Inservice
Role of the Library Media Specialist
Pegasus Prancing - Title I Inservice
Orientation for Title I/District Reading Teachers
Working with Learning Disabled and/or Behavior Problem Children
BASICS A (14)
AMA Leadership Seminar "Improving Managerial Performance" (82)
Reading Inservices at 3 schools

Winter, 1977

AMA Leadership Seminar "Improving Managerial Performance" (41)
Job Description Workshops for administrators, specialists, psychologists, social workers (70)
Employee Relations Seminar for Supervisors
Insurance Benefit Program - all employees
Developing Self Concept in Bilingual Children
Teaching Reading Creatively - Bilingual
Linguistic Program Models for Bilingual Children
Folk Dancing of the Southwest
Library Media Specialists Inservice

Spring, 1977

Athletic Staff Development and Improvement
Binney & Smith Art Inservice (50)
Math for Children with a Learning Disability (3)
Foundations of Bilingual Bicultural Education
Reading in the Content Area
Citizenship and Legal Education: Concepts, Methodology, and Materials
Awareness Session: Civic/Values Education Concepts/Approaches/Methodology/Materials
Self Contained Emotional/Behavioral Classroom
BASICS B (9)
Defensive Driving Course - 8 hours
First Aid Course - 8 hours (2 classes given)
Job Description Workshops for Bus Drivers and Custodians
Educational Office Personnel Spring Seminar "Understanding Other People," "T.A. for Secretaries," "Office Climate," "What Bosses Expect of Secretaries," and "Time Management for Secretaries"
Administrator Workshop "Managing Time and People" (233)
Job Description Workshops at 2 elementary schools
Athletic Fund Inservice
Fire Marshall's Association of Colorado

Summer, 1977

AMA Leadership Seminar "Improving Managerial Performance" (14)
Job Description Workshop (18)
BASICS Support/Leadership Training (14)
BASICS Training Trainers (4)
BASICS A (23)
Bilingual Inservice

Fall, 1977

Teacher Orientation
Office Personnel Orientation
BASICS B (41)
Music Workshop (40)
Neurological Workshop
Application and Evaluation of Tests for Exceptional Children
Metric Workshop
Metric Leadership Training Teams
Childcare Update Inservice
Behavioral and Readiness Techniques
School Health Curriculum Program - 4th grade Digestive Unit
5th grade Lung Unit
6th grade Heart Unit
7th grade Brain Unit
Correlating Language Arts and Social Studies
Spanish Language, History, Culture Bilingual Teaching Techniques
Team Teaching in a Bilingual Setting
Oral Language Extension for Bilingual Children
Integrating Media into the Curriculum at the Jr. High Level
Cardiopulmonary Resuscitation (9)
String Class Workshop (Music)
Application and Evaluation of Tests for Exceptional Children
Federal Special Education Laws and Rules
Neurology of Learning Disorders Workshop
Title I Fall Inservice
Reading in the Content Area Workshops (84)
Reading Workshop (29)
Reading Workshop (12)
Security Maintenance Seminars
Haynes Training Seminar on Boiling Systems
Adams County Pesticides
Mathematics Inservices (see attached sheet)

Winter, 1978

Mini-courses
Synergistic Educational Systems, Inc. "Three S Educational Management"
Evaluation and Selection of Bilingual and Bicultural Materials
Spanish, Language, History, Culture Bilingual Teaching Techniques
Performance Systems Corporation "Positive Discipline"

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Dr.
Denver, CO 80233

December 6, 1977

To: Dr. Harvie Guest, Director of Organizational Development & Personnel

From: Dee Gazewood, Mathematics Educational Specialist

INSERVICE AND PROFESSIONAL GROWTH CALENDAR - JUNE THRU DECEMBER, 1977

Date	Time	Location	Type of Inservice
October 25	1:00 - 2:30 p.m	Woodglen Elementary	Multi-age—primary - grouping techniques in math
October 26	8:15 - 10:30 a.m.	Meritt Hutton Jr.	District focus in math; objectives; PCRT's
October 26	1:00 - 4:00 p.m.	North Star Elem.	District focus in math; objectives; PCRT's - 4th and 5th grades
September 7	8:30 - 9:30 a.m.	North Star Elem.	District focus in math; objectives; PCRT's - 6th grade
September 8	9:30 - 10:00 a.m.	North Star Elem.	Grouping techniques using PCRT's
September 13	3:45 - 5:00 p.m.	Community Conf. Rm.	Metric Task Force leadership training
September 20	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice (district teachers) Session I
September 21	3:30 - 4:15 p.m.	Centennial Elem.	IDT training for kindergarten teachers and parents
September 22	7:30 - 8:30 p.m.	Malley Elementary	Citizen's Advisory Council - Metric Ed.
September 26	4:00 - 5:00 p.m.	Majestic Savings	Metric Task Force leadership training
September 27	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session II

Date	Time	Location	Type of Inservice
October 3	3:30 - 5:00 p.m.	Northglenn Jr.	Metric Task Force leadership training
October 4	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session III
October 6	3:10 - 4:10 p.m.	Meritt Hutton Jr.	Pre-service for staff members assisting with metric inservice
October 11	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session IV
October 13	12:30 - 1:30 p.m.	Westminster	Community metric overview
October 17	4:00 - 5:00 p.m.	Professional Lib.	Metric Task Force leadership training
October 18	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session V
October 19	1:15 - 3:45 p.m.	Meritt Hutton Jr.	Metric Workshop f/staff
October 20	7:30 - 9:00 p.m.	North Mor Elem.	Citizen's Advisory Council
October 24	3:15 - 4:15 p.m.	Northglenn Jr.	Pre-service for staff members assisting with staff/community metric inservice
October 25	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session VI
October 27	all day	Colorado Springs	Presided and assisted with workshop for the reluctant learner - CCTM
October 31	12:30 - 3:30 p.m.	McElwain Elem.	Calculator Inservice - intermediate staff
November 1	8:00 - 8:45 a.m.	Leroy Drive Elem.	District focus in math; objectives; PCRT's - 4th grade
November 1	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session VII
November 2	7:00 - 10:00 p.m.	Northglenn Jr.	Metric Inservice: 160 participants, both staff and community

Date	Time	Location	Type of Inservice
November 3	7:30 - 8:30 a.m.	Westview Elementary	District focus in math; objectives; PCRT's - 5th grade
November 7	4:00 - 5:00 p.m.	Majestic Savings	Metric Task Force leadership training
November 8	8:00 - 8:45 a.m.	Leroy Drive Elem.	District focus in math; objectives; PCRT's - 6th grade
November 8	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session VIII
November 9	8:00 - 8:45 a.m.	Leroy Drive Elem.	District focus in math; objectives; PCRT's - 5th grade
November 14	3:30 - 4:30 p.m.	Community Conf. Rm.	SLIC Inservice - techniques for math appropriate for SLIC students
November 15	4:00 - 6:30 p.m.	North Star Elem.	Metric Staff Inservice Session IX
November 28	3:30 - 4:45 p.m.	Community Conf. Rm.	P.C. Inservice - math for the learning disabled
December 5	3:30 - 5:00 p.m.	Professional Lib.	Metric Task Force leadership training
December 12	3:30 - 5:00 p.m.	Professional Lib.	Metric Task Force leadership training.
November 21	3:45 - 5:00 p.m,	Majestic Savings	Energy Workshop w/ Standing Math Committee

iv

Attach.

cc: Dick Eslinger

SURVEY OF "ORGANIZATIONAL HEALTH"

Evaluation Report

January 1977

Conducted by: Department of Evaluation
School District No. 12
Adams County
11285 Highline Drive
Denver, CO 80233

SURVEY OF "ORGANIZATIONAL HEALTH"

RESULTS

N = 37

The survey of "Organizational Health" was distributed on January 12, 1977 to all principals, assistant principals, central office administrators and teachers on special assignment.

In general, the results of the "Organizational Health" survey were indicative of agreement with the statements. Most items had a group mean of approximately 2 (which corresponds with "agree" on the rating scale). These items were:

Information Flow (item #1)
Goal Focus (item #2)
Goal Acceptance (item #3)
Communication Adequacy (item #4)
Accessibility to Superior (item #5)
Leadership (item #6)
Division of Responsibilities (item #9)
System Reputation (item #13)
Career Opportunities (item #14)
Job Satisfaction (item #15)
Morale (item #16)

The items with group means of approximately 3 (which corresponds with "undecided" on the rating scale) were:

Staff Meetings (item #7)
Power Equalization (item #8)
Work Overload (item #10)
Coordination (item #11)
Problem Solving Adequacy (item #12)

The following report provides a tally of rating responses for each item as well as an average rating for the group.

1/27/77

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Northglenn, Colorado 80233

SURVEY OF "ORGANIZATIONAL HEALTH"
RESULTS N = 37

1. Information Flow: I am kept adequately informed of those decisions, policies, and developments which affect the operation of my department.

4 1. Strongly Agree Mean = 2.32
24 2. Agree
2 3. Undecided
7 4. Disagree
- 5. Strongly Disagree
- No Response

2. Goal Focus: The educational goals of the School District No. 12 schools are clear to me.

8 1. Strongly Agree Mean = 1.97
23 2. Agree
5 3. Undecided
1 4. Disagree
- 5. Strongly Disagree
- No Response

3. Goal Acceptance: I accept the educational goals of the School District No. 12 schools.

13 1. Strongly Agree Mean = 1.81
18 2. Agree
6 3. Undecided
- 4. Disagree
- 5. Strongly Disagree
- No Response

4. Communication Adequacy: I feel free to discuss with my superior any operational problem affecting my department, and to express a differing viewpoint without fear of recrimination.

15 1. Strongly Agree Mean = 1.97
13 2. Agree
4 3. Undecided
5 4. Disagree
- 5. Strongly Disagree
- No Response

5. Accessibility to Superior: My immediate superior is generally available whenever I need to see him.

Mean = 1.88

14	1.	Strongly Agree
16	2.	Agree
2	3.	Undecided
4	4.	Disagree
-	5.	Strongly Disagree
1		No Response

6. Leadership: I believe that my superior expects me to take the leadership in initiating changes to improve my department's effectiveness, rather than waiting for his instructions before taking action.

Mean = 1.83

17	1.	Strongly Agree
12	2.	Agree
5	3.	Undecided
3	4.	Disagree
-	5.	Strongly Disagree
-		No Response

7. Staff Meetings: The frequency and the format of the Superintendent's Staff meetings make them maximally productive.

Mean = 2.71

2	1.	Strongly Agree
14	2.	Agree
12	3.	Undecided
6	4.	Disagree
1	5.	Strongly Disagree
2		No Response

8. Power Equalization: There is an equitable distribution of influence among staff members of comparable rank.

Mean = 2.88

4	1.	Strongly Agree
9	2.	Agree
11	3.	Undecided
11	4.	Disagree
1	5.	Strongly Disagree
1		No Response

9. Division of Responsibilities: There is a clearly defined and reasonable division of responsibilities among the various departments.

Mean = 2.55

3	1.	Strongly Agree
21	2.	Agree
4	3.	Undecided
5	4.	Disagree
3	5.	Strongly Disagree
1		No Response

10. Work Overload: There is an equitable distribution of personnel resources among the various departments, with no one either overloaded or idling.

-	1.	Strongly Agree
5	2.	Agree
12	3.	Undecided
16	4.	Disagree
3	5.	Strongly Disagree
1		No Response

Mean = 3.47

11. Coordination: The planning efforts among the various departments are well coordinated to facilitate the educational programs of the various schools.

1	1.	Strongly Agree
13	2.	Agree
7	3.	Undecided
14	4.	Disagree
1	5.	Strongly Disagree
1		No Response

Mean = 3.02

12. Problem-Solving Adequacy: The problem-solving mechanisms within this organization function to respond promptly and effectively to the needs of the school system.

-	1.	Strongly Agree
20	2.	Agree
7	3.	Undecided
8	4.	Disagree
1	5.	Strongly Disagree
1		No Response

Mean = 2.72

13. System Reputation: The School District No. 12 schools are widely recognized and respected for their excellence.

12	1.	Strongly Agree
17	2.	Agree
4	3.	Undecided
3	4.	Disagree
-	5.	Strongly Disagree
1		No Response

Mean = 1.94

14. Career Opportunities: I feel that my career and promotion opportunities are excellent in School District No. 12.

5	1.	Strongly Agree
13	2.	Agree
12	3.	Undecided
7	4.	Disagree
-	5.	Strongly Disagree
-		No Response

Mean = 2.56

15. Job Satisfaction: I get much personal satisfaction from, and take considerable pride in, my position as a member of this staff.

23 1. Strongly Agree
12 2. Agree
1 3. Undecided
1 4. Disagree
- 5. Strongly Disagree
- No Response

Mean = 1.45

16. Morale: My morale as a member of this management team is good.

12 1. Strongly Agree
14 2. Agree
5 3. Undecided
5 4. Disagree
1 5. Strongly Disagree
- No Response

Mean = 2.16

17. New Practices: An organization may emphasize the importance of adhering to those practices which have proven to be effective, or it may emphasize the need to find new ways of doing things. Please check the statement below which reflects your recommendation concerning the future direction School District No. 12 should take in this matter.

1 1. New practices should be introduced much faster.
5 2. New practices should be introduced a little faster.
15 3. The present emphasis on new practices should be continued.
10 4. New practices should be introduced more slowly.
3 5. New practices should be introduced much more slowly.
3 No Response

Mean = 3.17

JK:hc
1/26/77

Appendix G.2

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Denver, Colorado 80233

APPENDIX 1

SURVEY OF "ORGANIZATIONAL GROWTH" RESULTS

In general, the results of this survey indicate more agreement in 1977 than in 1973 among the elementary and secondary groups. However, the central office respondents have shown a trend moving away from agreement toward indecision.

The audience breakdown for both years is listed below:

	1973		1977	
	No.	Percentage	No.	Percentage
Elementary principals	11	92%	13	81%
Secondary principals	8	100%	8	100%
Central office directors & Executive Team members	8	89%	10	77%

The analysis of data provides a breakdown by item and by group. Included in the following pages are 1) a statistical and narrative summary for each item on the survey and 2) a table of mean comparisons. A T-test was conducted in order to determine the significance of differences between the 1973 and 1977 results.

The respondents were asked to rate each item according to the following scale:

1 = strongly agree
2 = agree
3 = undecided
4 = disagree
5 = strongly disagree

Thus, when comparing the mean ratings for 1973 and 1977 one must remember that when the mean increases there is less agreement now than in 1973 and vice versa.

1/21/77 JK

Comparison of Organizational Growth Survey Results
Page 2

QUESTION	MEANS							
	ELEMENTARY		SECONDARY		CENTRAL OFFICE		TOTAL GROUP	
	1973	1977	1973	1977	1973	1977	1973	1977
1	2.14	2.08 P	3.17	2.15*P	2.00	2.20 N	2.30	2.11 P
2	2.64	2.00*P	3.67	1.75*P	2.56	1.80*P	2.66	1.85*P
3	2.14	2.00 P	2.50	2.75 P	2.17	2.00 P	2.23	2.11 P
4	2.29	1.77*P	2.67	2.50 P	1.86	2.60*N	2.26	2.30 N
5	1.93	2.38*N	2.67	2.25*P	1.75	2.10*N	2.04	2.33 N
6	3.00	2.15*P	3.33	2.00*P	1.89	2.78*N	2.72	2.15*P
7	2.29	2.15 P	2.50	2.63 N	2.00	2.80*N	2.24	2.63*N
8	2.07	2.62*N	2.17	2.53*N	1.67	2.50*N	1.97	2.63*N
9	1.71	2.31*P	1.33	2.13*P	1.67	2.20*P	1.62	2.22*P
10	3.57	2.92*N	3.83	3.38*N	1.27	1.27 N	3.62	1.04*N
11	2.36	1.92*P	1.83	2.00 N	2.00	1.78 P	2.07	1.86 P
12	2.93	3.33*P	3.13	3.00*N	3.00	3.78*P	3.04	3.38*P
13	2.00	2.08 N	2.83	2.00*P	1.78	2.00 N	2.24	2.00 P
14	1.47	2.85*P	1.67	2.75*P	3.00	2.44*P	3.62	2.73*P

* Significantly different

P = Positive Growth

N = Negative Growth

Questions:

1. I feel that I am kept adequately informed of those developments in the school district's operations which affect my function as an administrator.
2. The educational goals of School District No. 12 are clear to me.
3. I feel I have sufficient freedom to initiate curricular programs appropriate to the needs of the students in my school or department.
4. I have sufficient authority to meet my responsibility for the success of the educational program in School District No. 12.
5. I feel that I receive appropriate support from administrative personnel when parental groups or critics inquire about conditions in my school or department.
6. I feel that I am a part of the total management team of School District No. 12.
7. I feel free to discuss important matters of concern with the Superintendent personally.
8. I believe there is ample opportunity in the administrators' meetings for a free exchange of views.
9. I feel a need for intensified continuing education opportunities, perhaps on a once-a-month basis, dealing with new developments or trends in administration and instruction.
10. There are too many administrative meetings for me to attend and provide leadership in my building or department.
11. As an administrator, my involvement in personnel selection is desirable practice and is working as intended (except for leave returnees, integration transfers, etc.)
12. The agreements resulting from negotiations with the District No. 12 Educators' Association have seriously infringed on my authority as an administrator in areas where I need to provide instructional leadership.
13. My morale as an administrator is good.
14. The planning efforts among the various departments at the administrative level are well-coordinated to provide the services that are required for an effective program in my school or department.

JK
1/20/77

Appendix G.3

ENCLOSURE C-3.

STUDENT ACCOMPLISHMENT INDICATORS

Department of Management,
Analysis & Evaluation

School District No. 12, Adams County
11285 Highline Drive
Denver, CO 80233

August 15, 1977

SUPERINTENDENT'S FACT BOOK
SECTION 9.C DATE 12-77
REVISION _NEW X PG# 9.2

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Northglenn, Colorado 80233

August 1, 1977

SUMMARY OF TESTING RESULTS, 1976-1977

The results of the testing program indicate that the instructional programs are basically providing a quality education to the students of District No. 12.

Achievement Testing

The Comprehensive Tests of Basic Skills (Reading, Math and Language) were administered to all students in grades 6 and 9, and a 25% sample of grade 11 students in February of 1977. The achievement testing shows District No. 12 student scores to be above the national average in all of the areas tested. The results document that in seven out of twelve areas across the three grade levels tested, District No. 12 students scored higher than the anticipated level for the most similar group of students in the national norm group.

(See Pages 1 through 12 for the specific achievement scores of Grades 6, 9 and 11.)

Program Criterion Referenced Testing

The Program Criterion Referenced Tests were administered in May of 1977 to all students in grades 3 through 6 (Reading and Math), all students in grades 7 through 9 (Math), and a 30% sample of 10th graders (Math). These results clearly show growth toward the desired mastery level in Reading and Math. Nine out of twelve tests given indicate a positive growth. Two of the three tests showed a negative growth but are considered to be non-significant changes. The third test was clearly negative and has been traced to the increased difficulty of at least eight items on this specific test.

(Pages 13 through 25 provide a detailed description of the Program Criterion Referenced Testing results.)

Summary

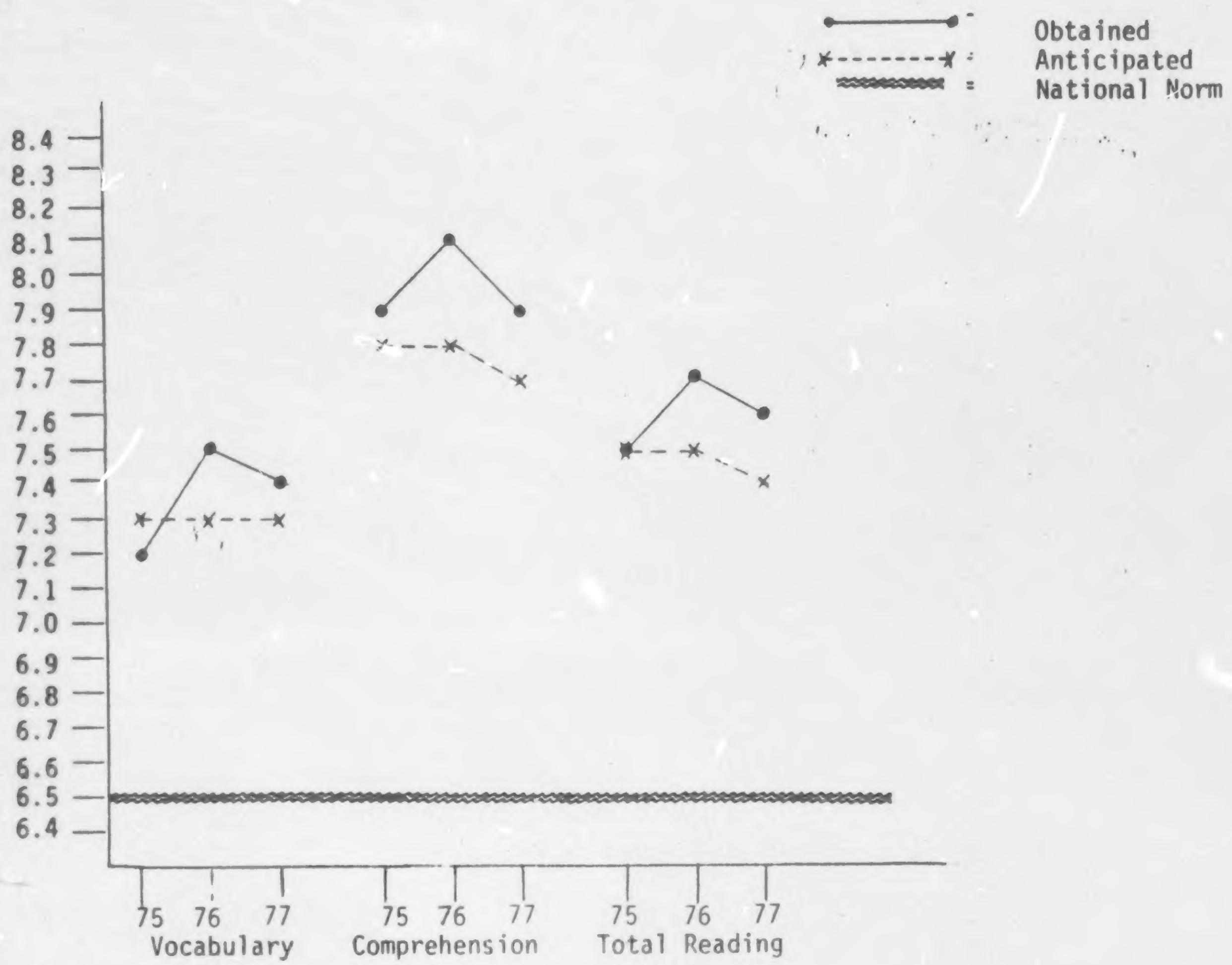
Summarizing the test results for the 1976-1977 school year, it can be said that they are a very positive quality indicator of the District's educational program. The achievement results did pinpoint one area as "exceptionally strong" (Reading), and another as above average (Math). The area of Language Arts (specifically Language Mechanics and Spelling) was shown to have a stronger need for improvement than the others.

The Criterion Referenced Tests indicate an increase in the percentage of students mastering the district objectives in Reading and Math.

JK:hc

COMPREHENSIVE TESTS OF BASIC SKILLS

TOTAL DISTRICT
1975-1976-1977



Reading Vocabulary

This subtest has remained somewhat stable from 1975-1977. In 1975 there was a -0.1 difference between Obtained and Anticipated scores. A three month gain in 1976 pushed the diffference up to +0.2 and this year has remained similar at +0.1.

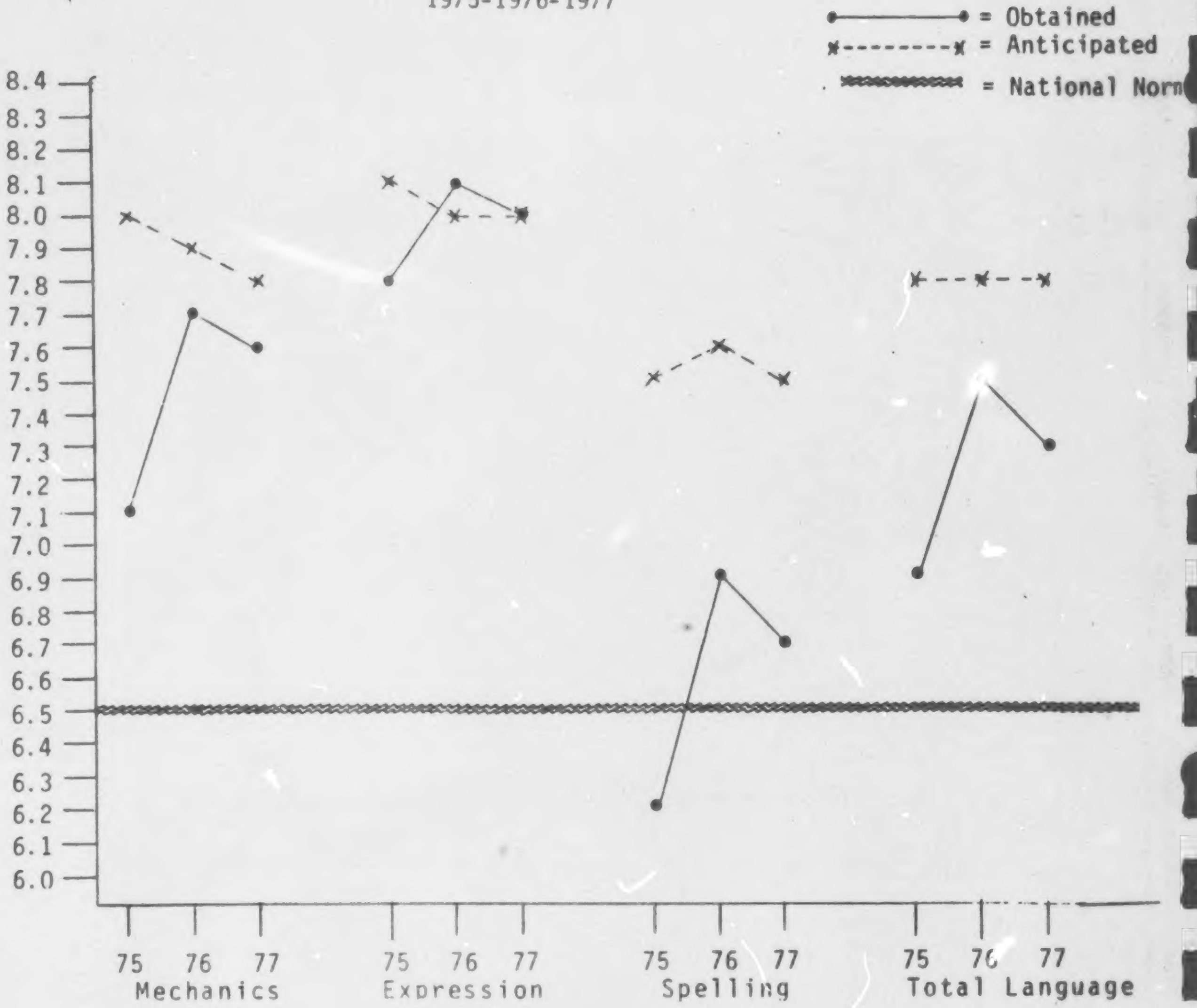
Reading Comprehension

Reading Comprehension shows the same pattern of change as Reading Vocabulary In 1975 the difference between Obtained and Anticipated was +0.1. This rose to +0.3 in 1976 and fell one month to +0.2 this year.

Total Reading

Total Reading scores showed no difference between Obtained and Anticipated in 1975. There was a two month increase bringing the Obtained-Anticipated comparison up to +0.2 for 1976 and 1977.

LANGUAGE - GRADE 6
TOTAL DISTRICT
1975-1976-1977



Language Mechanics

The difference between Obtained and Anticipated scores have shown significant gain from an original 1975 difference of -0.9 to -0.2 in 1976 and 1977.

Language Expression

In 1975 the difference between Obtained and Anticipated for this subtest was -0.3. In 1976 the Obtained average was one month above anticipated (+0.1) indicating a four month growth factor. This year Obtained and Anticipated scores were equal which was not a significant change from 1976.

Spelling

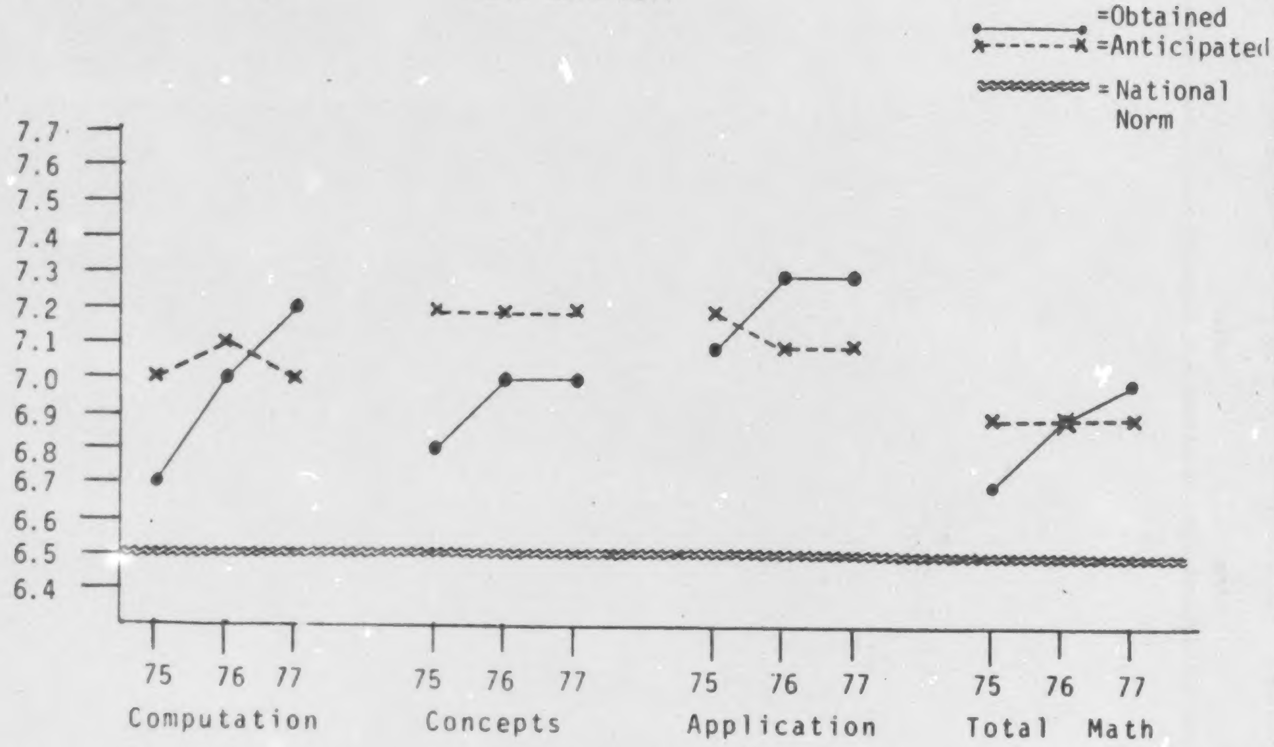
Spelling showed a significant gain from 1975 to 1976 but did not change significantly from last year. In 1975 the difference between Obtained and Anticipated was -1.3. This discrepancy was narrowed to -0.7 in 1976 and fell at -0.8 this year.

Total Language

The average Obtained score in 1975 was nine months below anticipated (-0.9). The next year of testing produced a -0.3 difference and this year a -0.5 difference which shows a gain in overall performance from 1975.

CTBS
MATH - GRADE 6

TOTAL DISTRICT
1975-1976-1977



Math Computation

This subtest has shown improvement in performance from an original 1975 Obtained-Anticipated difference of -0.3 to -0.1 in 1976 and finally +0.2 this year.

Math Concepts

The scores for 1975 showed Obtained scores falling four months below Anticipated. (-0.4). There was a slight change in 1976 to a -0.2 difference which remained constant this year.

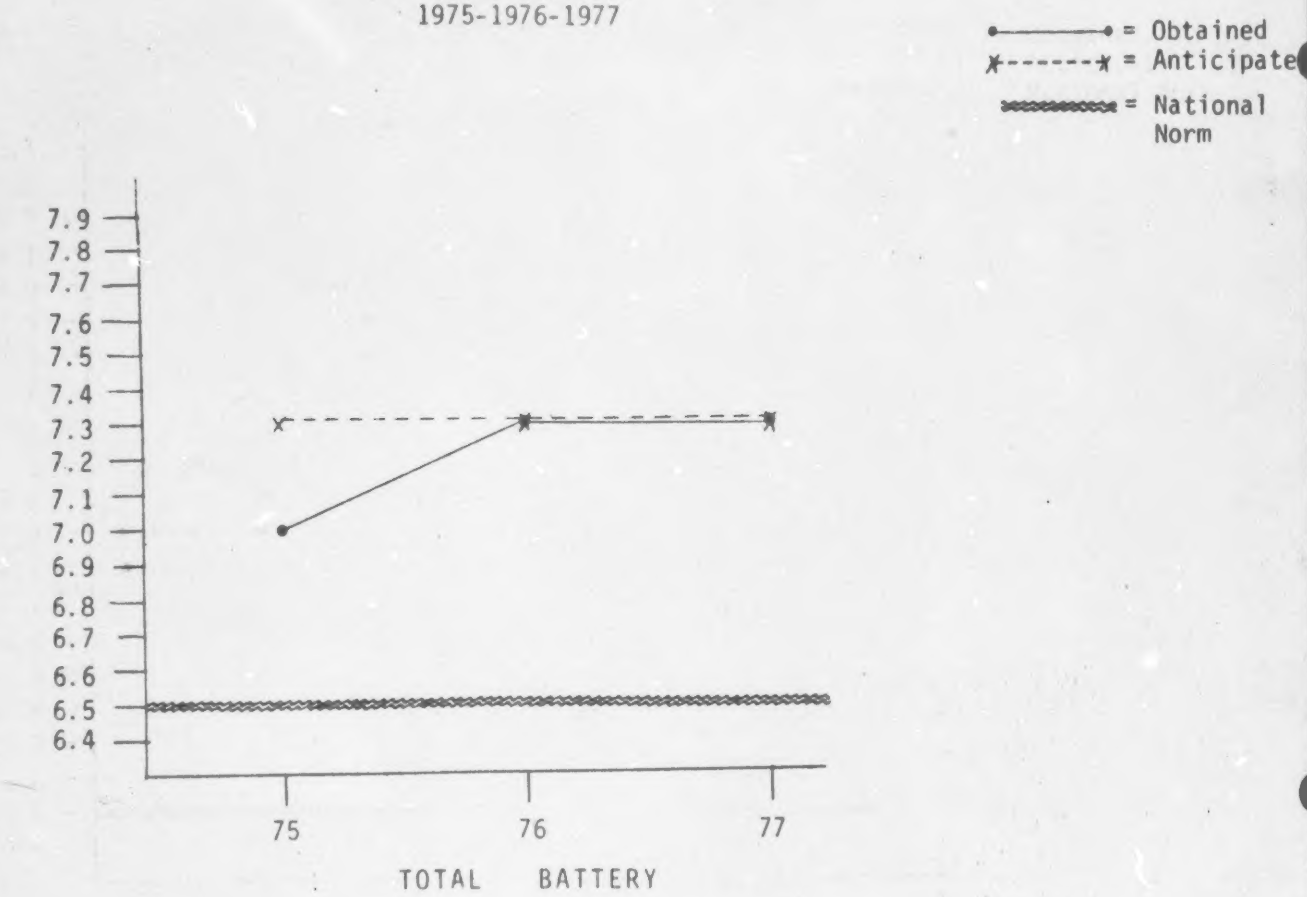
Math Application

The Obtained-Anticipated comparison for 1975 was -0.1 for this subtest. In 1976 Obtained scores fell two months above Anticipated (+0.2) and this difference was maintained this year.

Total Math

Total Math shows a positive growth pattern which reflects the other Math subtests. There was a -0.2 discrepancy between Obtained and Anticipated in 1975. In 1976 Obtained scores met Anticipated (were equal) and this year surpassed Anticipated by one month (+0.1).

CTBS
TOTAL BATTERY - GRADE 6
TOTAL DISTRICT
1975-1976-1977



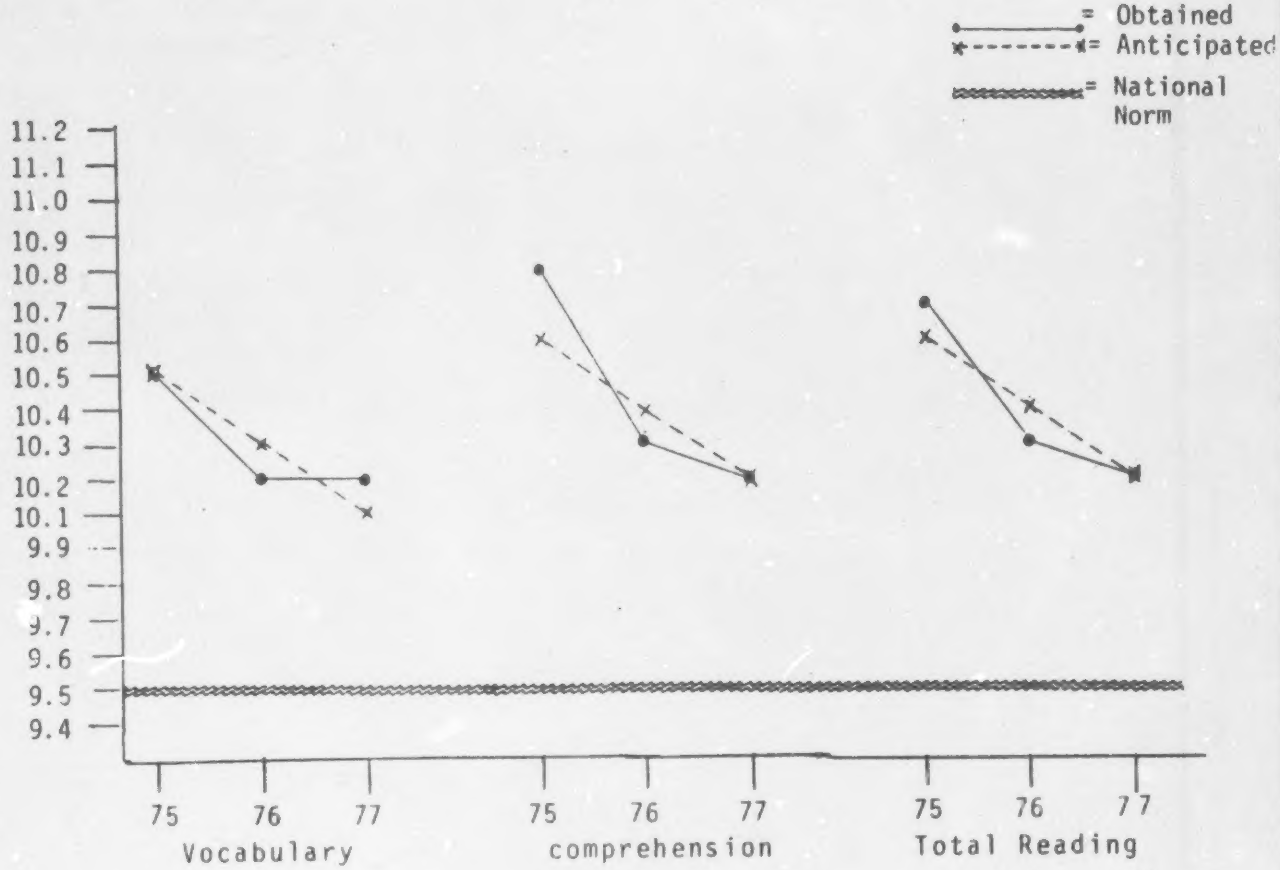
Total Battery

In 1975 there was a negative three month discrepancy factor between Obtained and Anticipated scores for Total Battery. In 1976 Obtained scores rose to the same grade equivalent as Anticipated. This year once again there was no difference between Obtained and Anticipated scores.

Total District
General Comments

The aptitude levels of the 6th grade students appears to be very similar throughout the three years of testing in all areas. Achievement scores have fluctuated somewhat among the various subtest areas. In general, this year the scores tend to fall in between 1975's and 1976's. For Total Batterv Obtained and Anticipated are equal and exactly the same as last year. The results will be more conclusive at the end of five years. However, summaries at this time would indicate an overall stability of test results reflecting the district programs.

CTBS
READING GRADE 9
TOTAL DISTRICT
1975-1976-1977



Reading Vocabulary

The aptitude scores on this subtest have declined from 1975 to 1977. Achievement scores declined from 1975 to 1976 but remained stable this year. In 1975 there was no difference between Obtained and Anticipated scores. In 1976 there was a -0.1 difference and this year a +0.1 difference. This indicates improvement in the area of Reading Vocabulary.

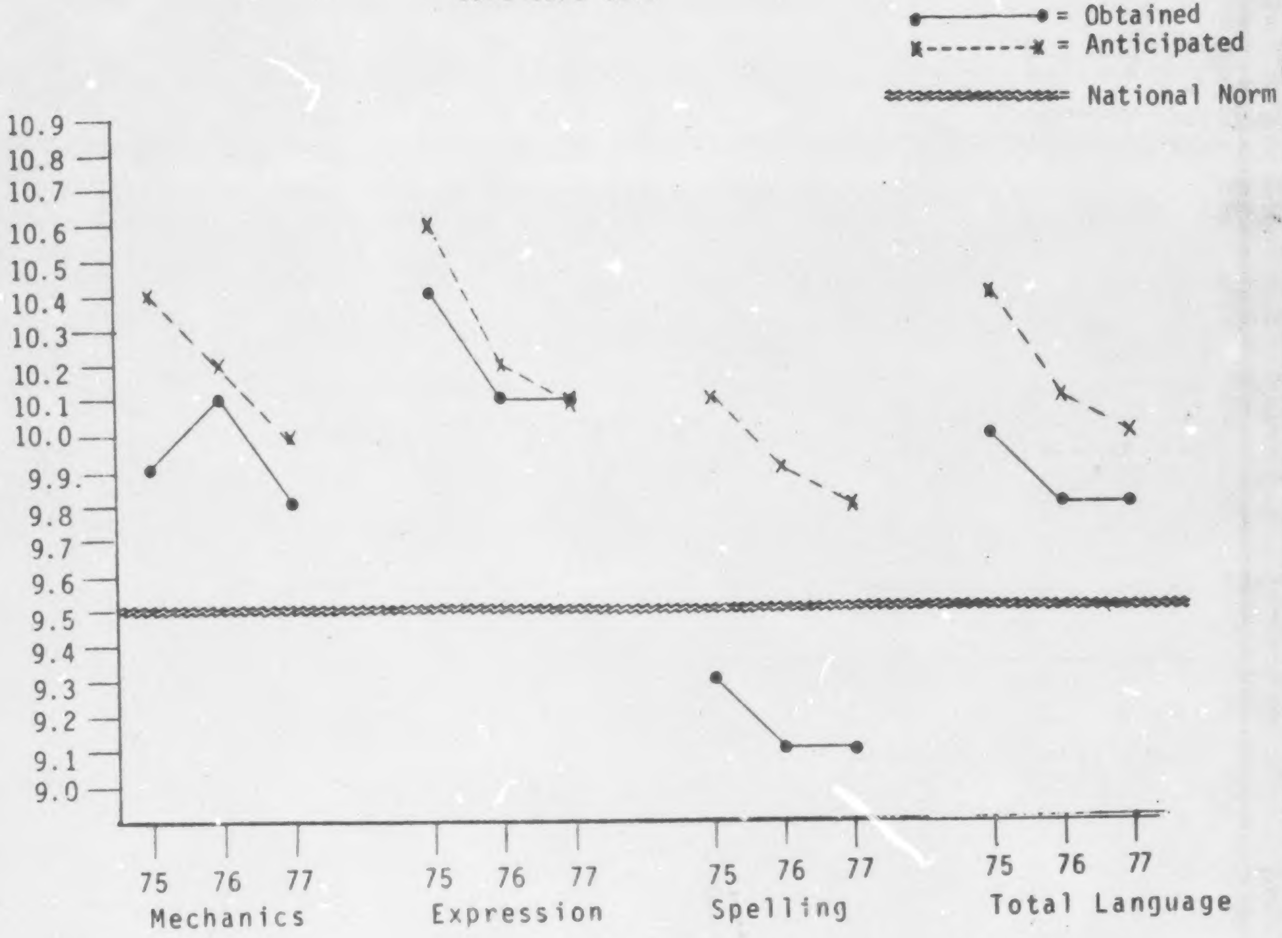
Reading Comprehension

In 1975 Obtained scores fell, on the average, two months above Anticipated. There was a slight decline in this discrepancy to a -0.1 difference. However, this year Obtained and Anticipated are equal.

Total Reading

Total Reading shows the same pattern of growth that Reading Comprehension shows. In 1975 the difference between Obtained and Anticipated was +0.1, -0.1 in 1976 and no difference between the two scores this year. The Reading Program for Total District, Grade 9 appears to be relatively strong and is beginning to indicate stability.

CTBS
LANGUAGE - GRADE 9
TOTAL DISTRICT
1975-1976-1977



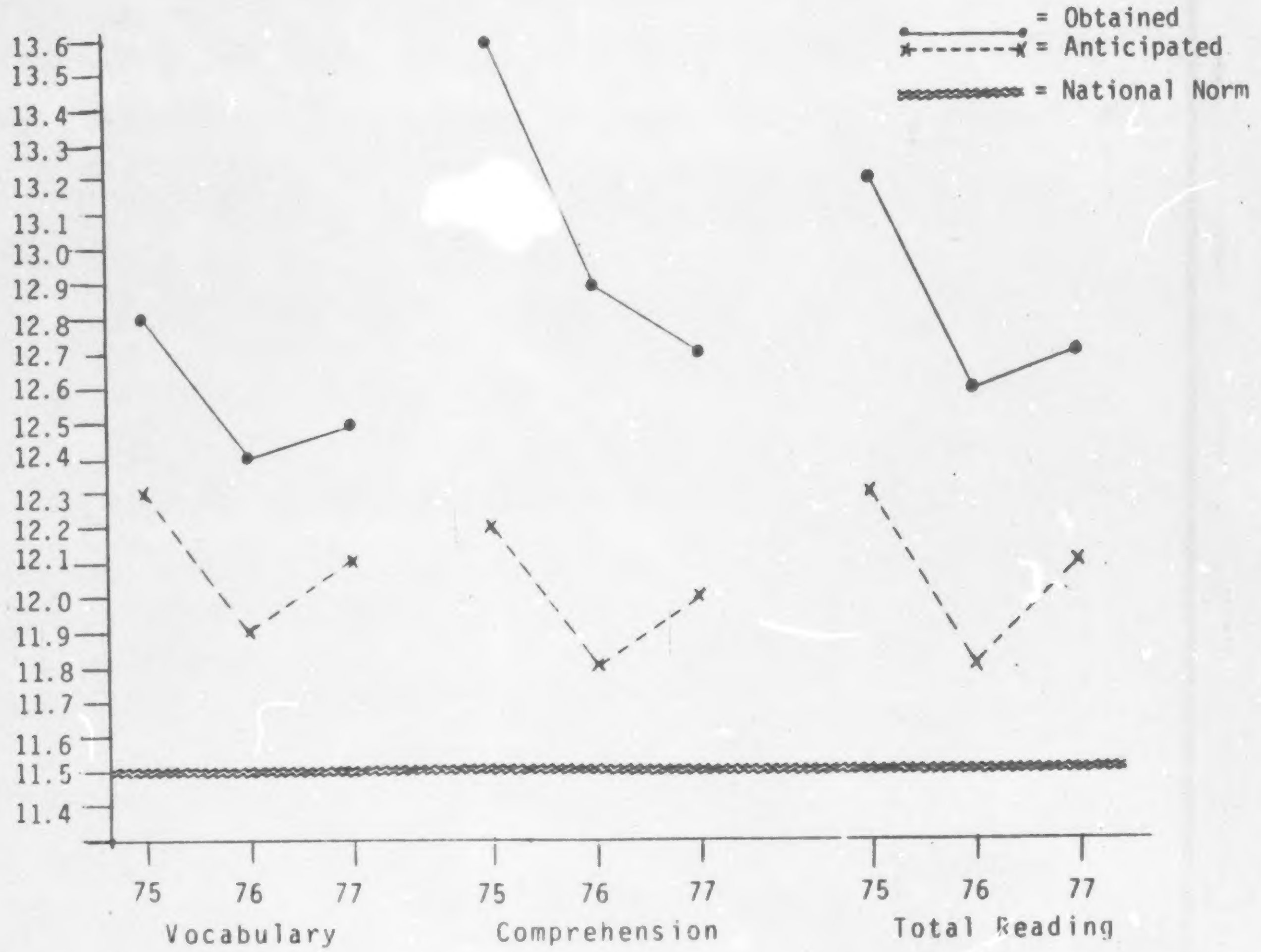
Language Mechanics
This subtest has fluctuated from a -0.5 difference between Obtained and Anticipated in 1975 to a -0.1 difference in 1976, to -0.2 this year. The difference between last year's scores and this year's is not educationally significant.

Language Expression
This subtest showed no change in the discrepancy between Obtained and Anticipated between 1975 and 1977 (-0.2 to -0.1). There was also very little change noted this year; however, Obtained and Anticipated have reached the point where they are equal.

Spelling
The negative discrepancy between Obtained and Anticipated in Spelling has narrowed slightly this year. There was a -0.8 difference in 1975 and 1976. This year the difference was -0.6. This could be the beginning of a positive trend.

Total Language
The Obtained-Anticipated negative discrepancy has narrowed slightly from 1975 to 1977 with a difference of -0.4 in 1975, -0.3 in 1976 and -0.2 this year.

READING - GRADE 11
TOTAL DISTRICT
1976-1976-1977



Reading Vocabulary

In Reading Vocabulary the difference between Obtained and Anticipated scores has remained stable from a +0.5 difference in 1975 and 1976. This year the difference is +0.4.

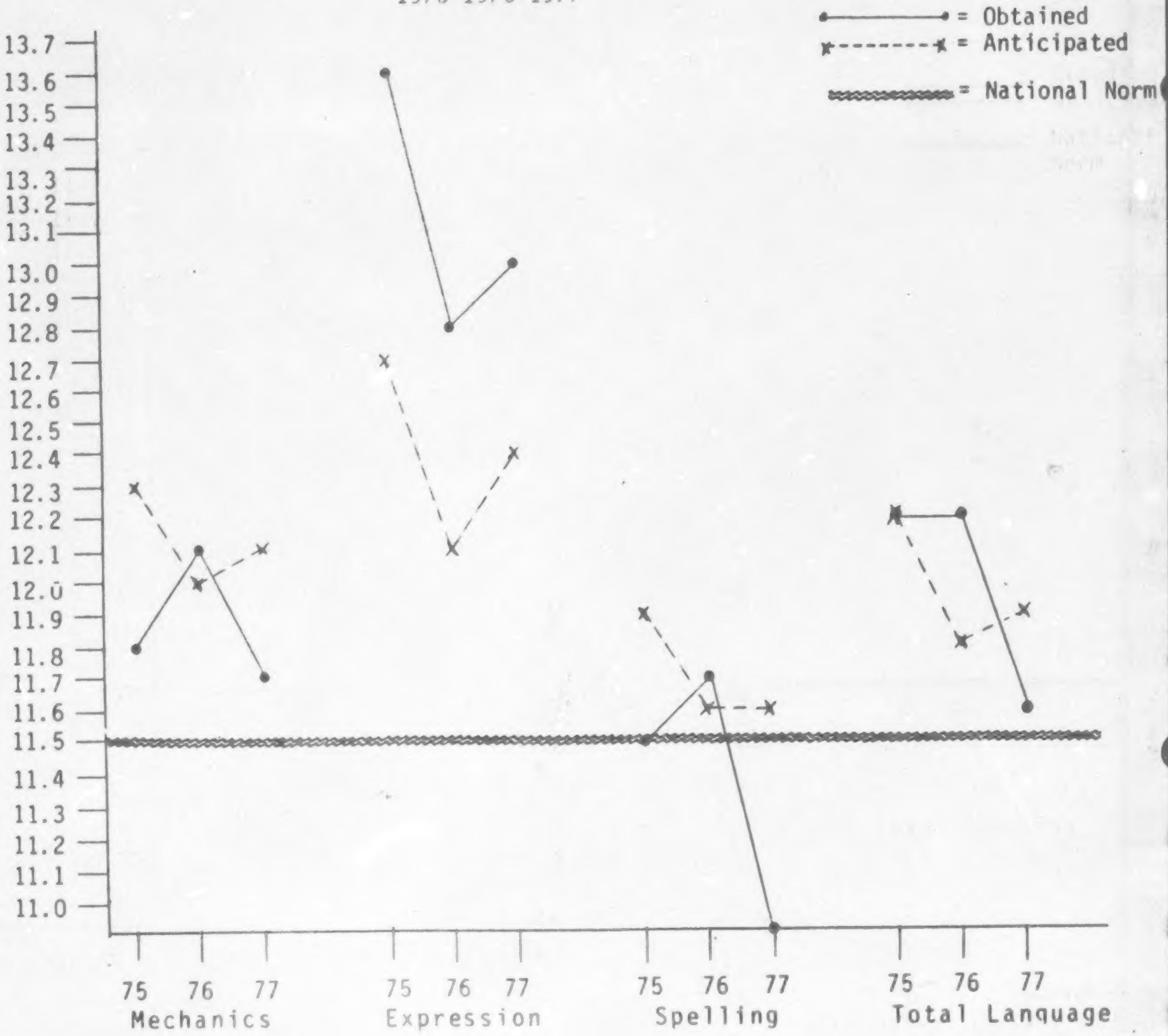
Reading Comprehension

Reading Comprehension has shown a slight decline in results from 1975 to 1977, however, Obtained scores are still averaging seven months above Anticipated. In 1975 there was a +1.4 difference and a +1.1 last year.

Total Reading

Reading Achievement scores remain significantly higher than Aptitude for 1975, 1976 and 1977. There was a +0.9 difference between Obtained and Anticipated in 1975, +0.8 in 1976 and +0.6 this year.

LANGUAGE - GRADE 11
TOTAL DISTRICT
1975-1976-1977



Language Mechanics

This subtest has fluctuated from a -0.5 difference between Obtained and Anticipated in 1975 to a +0.1 discrepancy in 1976 and this year is back down to a difference of -0.4.

Language Expression

This subtest's Obtained scores have remained significantly higher than Anticipated from 1975 to 1977. In 1975 Obtained scores were +0.9 above Anticipated. In 1976 this difference was +0.7 and this year +0.6.

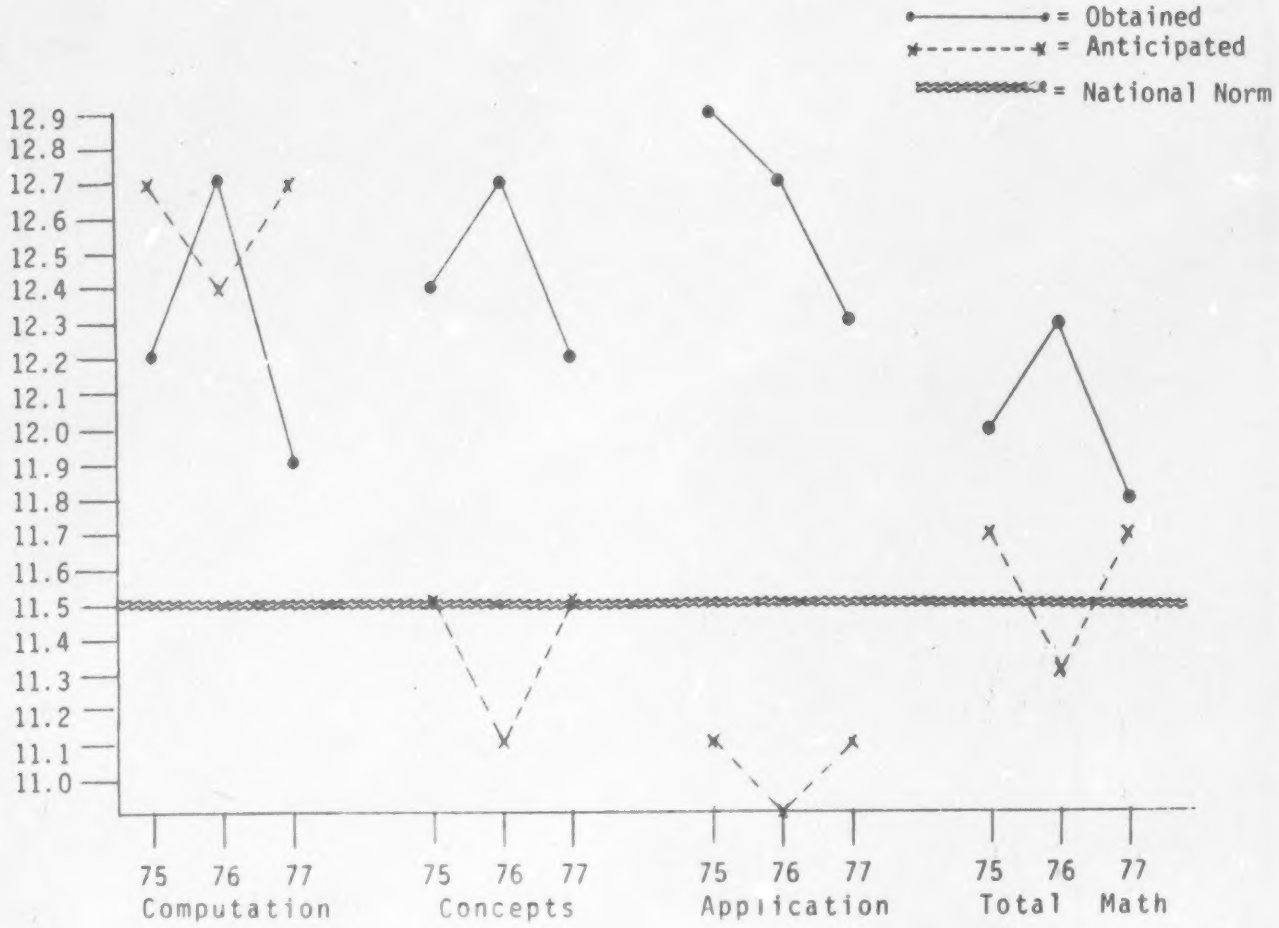
Spelling

Spelling shows a significant decline this year with Obtained scores falling -0.8 below Anticipated. In 1975 there was a -0.4 difference and last year an increase to +0.1.

Total Language

Total Language shows a pattern of increase in scores from 1975 to 1976 but a drop from 1976 to 1977. The Obtained-Anticipated comparison was 0.0 in 1975, +0.4 in 1976 and -0.3 this year.

CTBS
MATH - GRADE 11
TOTAL DISTRICT
1975-1976-1977



Math Computation

From 1975 and 1976 this subtest showed a rise in scores as reflected in a -0.5 to +0.3 difference between Obtained and Anticipated. However, this year there has been a significant decline to -0.8.

Math Concepts

This is a subtest showing strength throughout all three years of testing. Obtained scores fell +0.9 above Anticipated in 1975, +1.6 in 1976 and +0.7 this year.

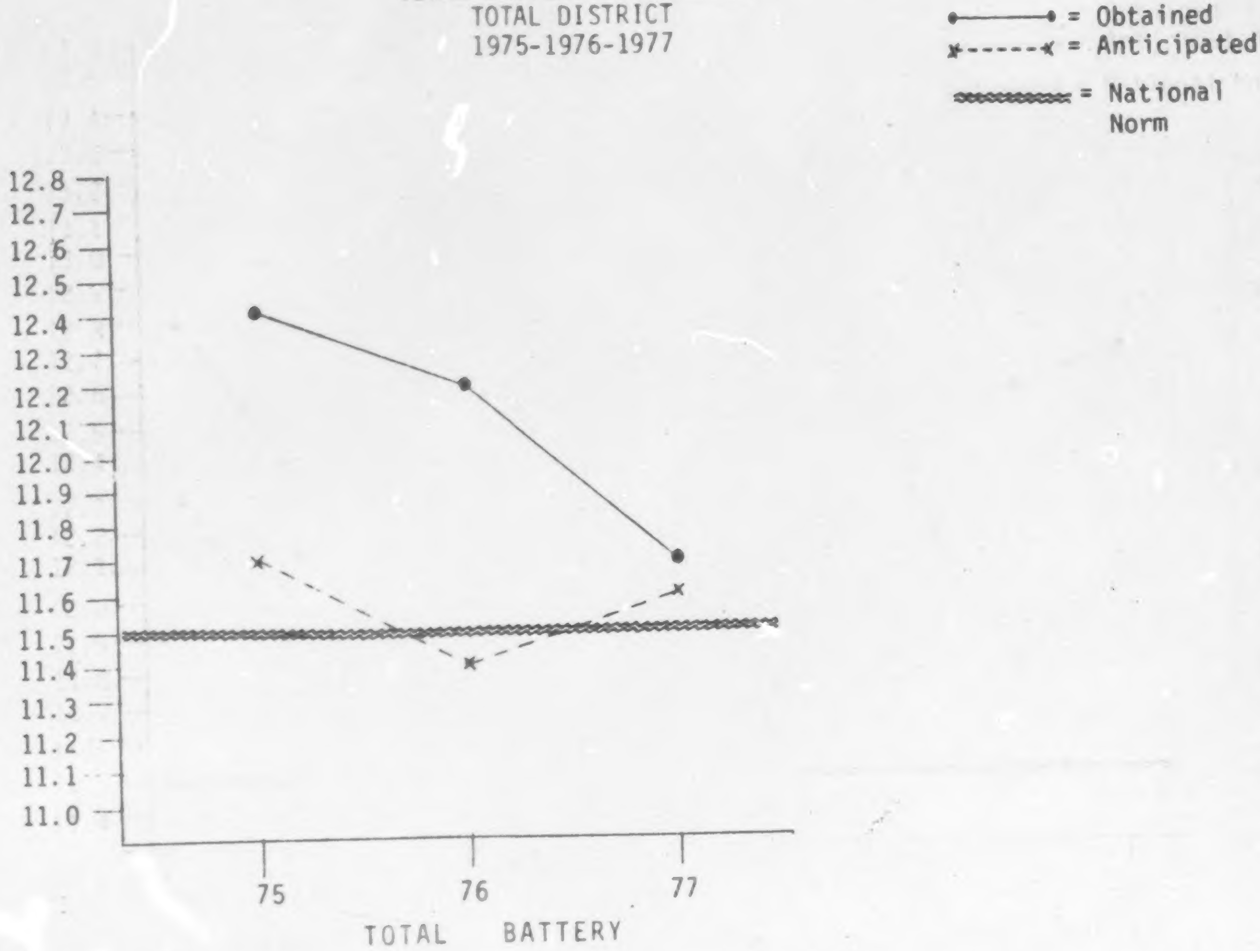
Math Application

This subtest also indicates strength maintained from 1975-1977. The discrepancy between Obtained and Anticipated was +1.8 in 1975, +1.9 in 1976 and +1.2 this year.

Total Math

There was a significant increase in the positive difference between Obtained and Anticipated from 1975 to 1976 (+0.3 to +1.0). This year the Obtained score has remained above Anticipated by one month.

CTBS
TOTAL BATTERY - GRADE 11
TOTAL DISTRICT
1975-1976-1977



Total Battery

In 1975 there was a +0.7 difference between Obtained and Anticipated scores. This remained somewhat stable with a +0.8 difference in 1976. This year the difference between Obtained and Anticipated is still positive but has dropped six months to +0.1.

General Comments

The Reading Achievement as reflected in these scores appears to be very strong and stable. Language seems to vary depending upon which subtest is involved. This is also true for Math.

In general it appears that the overall aptitude of the 11th grade population dropped in 1976 but rose again this year.

SCHOOL DISTRICT NO. 12, ADAMS COUNTY
11285 Highline Drive
Northglenn, Colorado 80233

July 22, 1977

SUMMARY OF CHANGES BETWEEN 1976 AND 1977

The original objective or goal of the Program Criterion Referenced Testing was that 70% of the students would master 70% of the objectives at each grade level. It would be unrealistic to expect to reach this goal the first few years of testing due to the fact that test development requires refinement for the first few years. Also, one would expect a greater awareness on behalf of the educators to teach the objectives designated and measured by the tests as years progress.

Listed below are the results of the 1977 testing compared with last years results. Significant growth is shown in almost all grades and indicates that after this second year of testing, the overall district trend indicates significant movement toward the final goal of 70% mastery by 70% of the students.

A more specific breakdown of the percentage of students mastering certain percentages of objectives are shown for each grade level and test.

PERCENTAGE OF STUDENTS MASTERING AT LEAST 70% OF OBJECTIVES

Reading	1976	1977	Difference
Grade 3	51.4%	59.3%	+ 7.9%
Grade 4	39.3%	49.6%	+10.3%
Grade 5	59.3%	58.8%	- .5%
Grade 6	47.2%	51.5%	+ 4.3%
Math			
Grade 3	68.3%	66.2%	- 2.1%
Grade 4	45.5%	58.3%	+12.8%
Grade 5	75.4%	62.0%	-13.4%
Grade 6	37.4%	44.8%	+ 7.4%
Grade 7	25.4%	48.4%	+23.0%
Grade 8	34.0%	47.8%	+13.8%
Grade 9	48.0%	64.3%	+16.3%
Grade 10	50.3%	59.1%	+ 8.8%

MAS/dlb

READING
GRADE 3

Percentage of Objectives Mastered	Percentage of Students 1976		Percentage of Students 1977	
0-9	2.7		2.4	
10-19	2.6		3.5	
20-29	3.8		5.8	
30-39	7.0		4.3	
40-49	8.8		6.4	
50-59	11.8		9.7	
60-69	12.1		8.7	
70-79	19.9	51.4%	19.6	59.3%
80-89	18.2		16.0	
90-99	11.8		17.8	
100	1.5		5.9	

In 1976, 51.4% of the third grade students mastered at least 70% of the objectives as measured by the third grade reading test. This year the percentage has increased by 7.9% to reach 59.3%. As last year, a significant percentage of students also came very close to this goal of 70% mastery with only a small percentage mastering less than 30% of the objectives.

ADING
ADE 4

Percentage of Objectives Mastered	Percentage of Students 1976		Percentage of Students 1977	
0-9	4.0		1.4	
10-19	2.5		6.4	
20-29	5.6		6.8	
30-39	7.7		4.0	
40-49	8.5		10.4	
50-59	14.9		12.5	
60-69	17.6		8.8	
70-79	13.6	39.3%	18.0	49.6%
80-89	17.0		21.9	
90-99	5.7		7.9	
100	3.0		1.8	

Last year, 39.3% of the fourth graders in District No. 12 mastered at least 70% of the objectives on the fourth grade reading test. This year the percentage has increased significantly to 49.6%.

READING
GRADE 5

Percentage of Objectives Mastered	Percentage of Students 1976		Percentage of Students 1977	
0-9	2.1		1.2	
10-19	1.6		3.5	
20-29	3.6		5.4	
30-39	4.0		3.6	
40-49	6.0		7.6	
50-59	10.3		11.5	
60-69	13.1		8.4	
70-79	16.3	59.3%	17.5	58.8%
80-89	27.4		24.3	
90-99	12.3		10.2	
100	3.3		6.8	

The fifth grade reading results do not indicate a significant change from last year to this year. The percentage of students mastering at least 70% of the fifth grade reading objectives remains near 60%.

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READING
GRADE 6

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	2.3		1.2	
10-19	2.3		3.5	
20-29	5.1		4.2	
30-39	5.4		7.9	
40-49	8.5		5.3	
50-59	12.6		9.9	
60-69	16.7		16.6	
70-79	21.6	47.2%	21.8	51.5%
80-89	20.4		23.8	
90-99	4.[illegible]		4.8	
100	.9		1.1	

The sixth grade reading test indicates that 4.3% more students mastered at least 70% of the objectives than last year.

MATH
GRADE 3

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	1.8		1.5	
10-19	1.9		1.5	
20-29	2.5		2.0	
30-39	3.8		4.1	
40-49	5.0		4.6	
50-59	7.3		11.8	
60-69	9.4		8.4	
70-79	16.5	68.3%	10.2	66.2%
80-89	14.0		13.0	
90-99	19.8		16.8	
100	18.0		26.2	

The third grade math results did not change significantly from 1976 to 1977. However, the percentage of students mastering at least 70% of the objectives remains very close to the 70% goal.

MATH
GRADE 4

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	2.9		.8	
10-19	2.4		3.9	
20-29	5.5		2.7	
30-39	6.7		7.0	
40-49	7.7		4.2	
50-59	13.5		10.4	
60-69	15.9		12.8	
70-79	18.6	45.5%	7.5	58.3%
80-89	19.3		22.2	
90-99	5.5		14.0	
100	2.1		14.6	

The fourth grade math results also show an increase in the percentage of students mastering at least 70% of the objectives. The percentage change went from 45.5% to 58.3%.

MATH
GRADE 5

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	1.5		2.0	
10-19	.8		2.1	
20-29	2.9		2.6	
30-39	2.1		3.9	
40-49	3.1		6.3	
50-59	5.7		10.2	
60-69	8.6		11.0	
70-79	12.5	75.4%	14.2	62.0%
80-89	21.6		22.3	
90-99	26.7		18.3	
100	14.6		7.2	

This is the only test which indicated a decline in the percentage of students mastering at least 70% of the objectives. The major reason for this is due to significant changes on at least 8 of the test items which were judged as being of greater difficulty this year than last.

MATH
GRADE 6

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	3.3		3.8	
10-19	5.9		6.2	
20-29	11.0		7.9	
30-39	9.8		11.6	
40-49	8.8		8.1	
50-59	12.2		8.6	
60-69	11.5		8.9	
70-79	12.2	37.4%	18.0	44.8%
80-89	11.8		13.9	
90-99	10.3		10.1	
100	3.1		2.8	

Sixth grade math test results have shown a 7.4% increase in the percentage of students mastering at least 70% of the objectives.

MATH
GRADE 7

Percentage of Objectives Mastered	Percentage of Students 1976		Percentage of Students 1977	
0-9	3.6		.5	
10-19	5.3		3.5	
20-29	11.8		4.9	
30-39	12.7		8.5	
40-49	13.9		10.5	
50-59	15.2		12.5	
60-69	12.0		11.3	
70-79	11.8	25.4%	13.1	48.4%
80-89	10.4		14.5	
90-99	2.1		14.7	
100	1.1		6.1	

Seventh grade math results showed the most significant gain from 1976 to 1977 with an increase of 23% of the students mastering at least 70% of the objectives.

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MATH
GRADE 8

Percentage of Objectives Mastered	Percentage of Students 1976		Percentage of Students 1977	
0-9	2.6		.7	
10-19	2.0		3.6	
20-29	6.2		4.1	
30-39	9.4		9.4	
40-49	12.3		7.2	
50-59	16.4		12.5	
60-69	17.2		14.6	
70-79	16.4	34.0%	10.2	47.8%
80-89	12.5		18.4	
90-99	3.6		13.4	
100	1.5		5.8	

Eighth grade math test results showed growth from 34% mastering at least 70% of the objectives last year to 47.8% this year.

MATH
GRADE 9

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	2.3		.7	
10-19	1.4		1.5	
20-29	3.4		2.4	
30-39	7.2		7.6	
40-49	8.2		6.4	
50-59	14.4		7.3	
60-69	15.1		10.0	
70-79	14.9	48.0%	16.8	64.3%
80-89	18.9		16.1	
90-99	10.7		19.9	
100	3.5		11.5	

Ninth grade math results showed a 16.3% gain in the percentage of students mastering at least 70% of the objectives as measured by this test.

MATH
GRADE 10

Percentage of Objectives Mastered	Percentage of Students			
	1976		1977	
0-9	.6		.3	
10-19	3.6		2.4	
20-29	2.8		3.7	
30-39	4.8		7.9	
40-49	9.2		8.4	
50-59	10.9		8.2	
60-69	17.9		10.0	
70-79	17.9	50.3%	21.1	59.1%
80-89	19.6		11.6	
90-99	9.2		18.7	
100	3.6		7.7	

Tenth grade math results indicate that 8.8% more students mastered at least 70% of the objectives this year than last year.

Case Study C

Garden City, Kansas

A Curriculum-based Approach

Matthew B. Miles
Center for Policy Research

(Part of a larger report on the State of the Art of OD in Education, funded by NIE to Michael Fullan, Matthew Miles, and Gib Taylor)

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Introduction

Garden City was selected from our pool of 26 school districts where successful, sustained OD programs had taken place for several reasons. The effort was organized around curriculum improvement, an approach which was not frequent in our sample, but reasonably successful in comparison with other approaches. We wished to understand the organizational consequences of an approach which focused mainly on the delivery of learning to students.

We also wished to include a range of settings in our case study, and Garden City is small and rural.

The Setting

Garden City is located in the "High Plains" area of western Kansas, at some distance from urban centers. The High Plains are dry country, but with the advent of new irrigation technology, Garden City has developed economically and grown considerably; it might be seen as being in transition from a rural to a small urban setting, with wealth about average for the state. The population presently is about 21,000 of whom 4,700 attend school. The socio-economic status breakdown is estimated at 15% upper middle, 30% middle, 30% blue collar, and 25% semi-skilled or unskilled labor. Though Garden City is primarily a WASP community, the school district has had a 130% increase in Mexican-American students, most of whose parents are farm laborers and agriculture-related workers.

In the Garden City school district (called Unified School District 457), there are 12 elementary schools, 2 junior high schools, and a high school, with a total of about 300 staff; there are only four central office administrators. Several of the elementary schools are small enough that a principal manages two; there are 12 principals altogether. Several school buildings are new ones, including a striking open-space elementary school. The general flavor a visitor gets is of a well-managed, fairly stable school system with little of the environmental turbulence that characterizes many urban and suburban districts in spite of its expansion over the past few years. The community is by and large satisfied with the education it is buying, one feels. The present superintendent, Dr. Horace Good, has been in the job for nine years. A recent bond issue carried with good support.

The system's stability seems to serve as a workable platform for a good deal of innovation. The last four years have seen the construction of two elementary and a junior high school; the introduction of aides to solve overcrowding problems, the addition of a new music complex to the high school, a bilingual program, an alternative high school-within-a-school, and a program for gifted students - all in addition to the programs directly adopted as a result of the development work described in this case study.

Data Base

Miles visited Garden City for two days in December of 1977. He interviewed the following:

2 external change agents
3 central office administrators
2 principals
5 teachers
1 board member (who was also a parent)

Of these, 1 administrator, 2 principals and 3 teachers had been actively involved as internal change agents. (Altogether 31 insiders have been so involved, including 20 teachers and 4 parents, according to the site questionnaires returned to us by mail.)

Miles also attended a routine Board meeting, and received a range of documents, including several reports from curriculum study groups, minutes of the district-wide curriculum council and grade-level and subject group meetings, and an overall description of the purposes, structure and functioning of the district's approach to curriculum development. He was also interviewed in turn by a local newspaper reporter ("Curriculum Plan Draws National Attention") who quoted him with reasonable accuracy:

> The educator said that it is his impression, as a visitor, that the program has taken a lot of energy and work and that it has gone some distance in clarifying school programs. So far, he said, there seem to have been no major problems.... There's a sense of [teacher] volunteerism and energy here that one does not find back East, he said.... The curriculum council appears to be bringing about better communication among school personnel.

The OD Program

Beginning in 1974, there have been two distinct program developments, both centered around curriculum change and improvement. The first involved the creation and installation of a 21-member district-wide curriculum council, including representatives of all departments and buildings. It is essentially a coordination and planning mechanism, whose mission includes the clarification and specification of district-wide and subject-area-specific goals; the review of materials, and budget planning. This work was carried out with little external assistance.

The second development has involved the selection and implementation of a number of specific educational programs, mostly drawn from the pool of such programs sponsored by the National Diffusion Network, a dissemination/diffusion mechanism sponsored by the Office of Education. The programs have included ones on learning disabilities, student self-esteem (Project Me), reading (Pegasus-Pace and Wisconsin Design), and mathematics (Project Smart). The selection and installation of the programs has involved the regular assistance of "linking agents" Ralph Parish, Jim Connett and Linda McNeely.

KEDDS/LINK,* a statewide facilitative group. Project LINK staff members characteristically helped committees of teachers, administrators and parents assess needs, review available innovations, visit other districts already using them, choose one innovation, and receive training and implementation support.

The development of the curriculum council and the adoption of various innovations with the help of Project LINK have not been structurally connected, except through the presence of common participants, most of all Charles Stones; the district Director of Instruction, who was central to the council project and stayed in close touch with the specific program adoptions.

With this brief overview, we turn to a more detailed historical account of each of these programmatic thrusts.

The Curriculum Council

Charles Stones, who arrived on the job in 1973, concluded soon afterward that there was little coordination K-12 as far as curriculum was concerned. As a teacher put it during an interview:

> There was no continuing program; teachers were going off on their own. Poor articulation [existed] between the junior high school and senior high school. The teachers were in the dark.

A member of the supportive Board suggested money be allowed for an assistant to Stones; he counter-proposed an ambitious and difficult alternative, the idea of a curriculum council, using approximately the same amount of money annually ($21,000). They commissioned him to start planning in June of 1973.

In 1974, he and John Dickerson, the assistant superintendent for personnel, developed an initial design for the Council.** This design was reviewed by principals, and taken back to department chairmen and building staffs. ("When it came back you wouldn't recognize it.") The primary issues were those of who would be represented on the Council (from departments, buildings), what the actual responsibilities and decision powers would be, and how its budget would be allocated. Some principals, as might be expected, tended to see the Council as potentially infringing on their prerogatives, especially since, Dickerson said, he had hoped to have the Council reporting directly to the Board.

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* KEDDS stands for Kansas Educational Dissemination and Diffusion System.

** Dickerson felt the need for the council as a way to keep curriculum issues (and the curriculum director) out of contract negotiations, a possibility which had existed since 1970. Too, he felt that the weak, rotating role of department chairman offered little in the way of prestige, reward, or mobility, and that a more durable council structure might help.

In any case, after a round of discussion with all administrators and another redesign (and reactions to that), a preliminary form of the Council was put in place experimentally in June of 1976, with a budget of $18,000. Stones estimated that the work so far had cost 125 hours of his time, somewhat less of Dickerson's; the average teacher in the system spent 6 hours, and the average principal 10-12 hours.

Although the external linkers (Parish, Connett and McNeely) knew of the structure's design and development, they did not provide design or group-building assistance. Technical advice was sought from two State Department consultants on matters such as specification of student goals and objectives.

In June 1977, the Council's structure and procedures were formalized, with a $22,000 budget. It now contains 21 members called "department coordinators" representing all buildings and subject areas. (Elementary schools usually have two "department heads", one for reading/language arts, the other for math, science and social studies.) Coordinators were selected by the curriculum director* from a larger group of "department heads", (selected by principals) whose mission was to meet regularly with relevant teachers for curriculum development work, including materials and textbook selection, development or selection of achievement tests, student needs assessment and program development. Both department heads and coordinators are paid a small increment, depending on the size of their constituencies, usually not over $600.

The Council, which meets at least monthly, serves as a mechanism for coordinating needs assessment, goal-setting, program development and in-service activity.

As Appendix A indicates, the design also specifies curriculum revision procedures carefully, focusing on particular areas each year. The process includes developing "terminal" goals, course-level goals, and reviewing materials, then the preparation of a "program package" for review by principals. These packages cannot be actually vetoed by principals, but their opposition is communicated to the superintendent along with the proposal. As in many districts, the issue could potentially become one of conflict between the content expertise of teachers and the principal's line responsibilities on the other. As we shall see, though decision powers are fully spelled out (see chart, "Curriculum Decision Making in USD 457" in Appendix A), some unclarity remains. In addition to resistance from some principals, the structure faces some uncertainty "down the pike" about whether the curricular decisions have "teeth" (that is, any provision for dealing with teachers who fail to follow the curriculum).

---

* The criteria for selection of coordinators appear to have been:
    --already "leaders"
    --credibility, confidence of others in them
    --lack of wish to "dictate" to others
    --representation across levels (elementary, junior high, senior high)
    --experience in district

In essence, then, the Council is an effort toward "grass roots curriculum development", as one person put it. As the chart shows, though department heads are part of the line structure, department coordinators have a dotted, staff-like relationship to upper management. The aim appears to be one of enabling widespread participation in school program development and planning. The structure is well linked together (for example, minutes of department meetings go to each coordinator and the Council).

A teacher recalled that the early stages of the council involved some struggle; many things were aired, and there was much evidence of prior lack of communication among teachers, within and across buildings. Another mentioned problems of follow-through on decisions, and some members seemed not very motivated; a few felt the structure was "window dressing" without real teacher influence. But the general view seems to be that the Council is functioning fairly well by now. Appendix C shows a typical recent agenda, and samples of attached materials, including department meeting reports.

Since its initiation, and its confirmation after the first year, the Council has worked actively in the language arts area (see sample pages from "Links of Language Arts", Appendix B) which specifies goals and objectives from kindergarten through senior high, and has worked on other areas including reading, science, special programs, a general philosophy for the Council, and the beginnings of work on fine arts.

It is difficult to make a good estimate of time costs. An approximation is that the Council meets monthly for a couple of hours. The department meetings may involve another 2-3 hours monthly; for those most vigorously involved, there may be an additional 8 to 10 hours a month. Most of this work occurs after school and evenings.

KEDDS/LINK*-mediated Innovations

Tracing the history of this part of the improvement work is more complex, since work has gone on in nine different buildings, covering at least seven different innovations. We will not try to be exhaustive.

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* KEEDS/LINK is defined as a "state facilitator" in Kansas. State facilitators in the National Diffusion Network, an effort supported by the U.S. Office of Education, work to aid the appropriate adoption of specific educational programs, most of them stamped with a federal "seal of approval" (by the Joint Dissemination Review Panel). Facilitators typically aid with needs assessment and planning, retrieve information about programs, aid with an adoption decision (sometimes by sponsoring visits to see the program in operation), and after adoption also arrange for the district people to receive training by the Developer-Demonstrator (the agency or district who originally developed the program in question). After implementation they also supply "maintenance" support.

The first work began in the spring of 1974. The High Plains special education cooperative, based in Garden City, was looking for pilot sites for a new program called Project Learning Disabilities. The director of KEDDS-LINK, Ralph Parish, knew Charles Stones from Stones' prior work on Title III innovative projects in Kansas, and proposed Garden City as one of the pilot sites. LINK staff members worked closely with a group from Jennie Wilson elementary school, including the principal, two regular teachers, a learning disability teacher and a psychologist. LINK brokered their training by the original developer of the PLD program, and aided with implementation planning. In the fall of 1975 "we started out and did it". Several people became proficient enough in the use of the program that they were able to serve as trainers for teachers in other buildings, a process still continuing. Beginning in 1976, Garden City also became a demonstration site for PLD, and was visited by other districts.

According to Jon Hoerman, the principal, the time involvement initially was not large: 4 days of off-site training, another day in the district, plus a total of 6 days spent in training others: this for a working group of about six people.

A second line of work beginning in 1974 involved the introduction of Pegasus-Pace reading to the new open-space Gertrude Walker elementary school. The then principal, Daye Krauser, had worked with the program for two years prior, and had done training workshops for LINK. LINK staff members aided with implementation and training; a feature of this work was increasing involvement of several teachers to serve as trainers and implementation-supporters in three other elementary schools in Garden City, with some financial support from LINK.

A third program involved Wisconsin Design reading. LINK began work in late 1975 with a group of Kansas school districts on reading issues, and actively invited Garden City to join. The principal and a teacher from Alta Brown elementary school attended an external "awareness" workshop with other districts. Then an internal steering group was created at the school (including Merle Wiederstein, the principal, three teachers, a board member, 2 parents, and Charles Stones). The group was chaired by a LINK staff member, Jim Connett; it proceeded beginning in the fall of 1976 through a systematic needs assessment, examination of materials describing forty or so reading programs, visits to three of them, and choice of Wisconsin Design as the best. By August of 1977 the whole faculty received training and the program started up gradually that fall.

The time investments in this more-intensive project included about twenty 2-hour meetings after school for the committee, plus 2 days for the faculty of 14. The linking agent spent about 20 days.

In parallel with this effort, Darryl McVey, the principal of Buffalo Jones, another elementary school, carried out a similar process with much less linker assistance. The work led to the adoption of Pegasus-Pace in three grades, and a math program (Project SMART) in the three upper grades.

A variety of other programs were introduced, including Every Child a Winner (a physical movement program), New Model Me, a self-esteem development program; Positive Attitude to Learning, also affectively-oriented, and the only secondary-level program, a computer-assisted grammar teaching program. (LINK helped in the latter case with technical assistance, and by financing teacher travel to see the program in operation elsewhere; they also occasionally financed external training for individuals on such matters as communication skills, evaluation methods, and criterion-referenced testing.)

Jim Connett's over-all estimate was that the various programs *after* the PLD work included LINK dollar support of about $9,600, plus 34 days of linking-agent time, for a three-year period.* He did not try to estimate internal time costs, but a rough estimate, looking at the projects we have described, might be five to eight times the number of the linker's days (keeping in mind that he or she typically worked with small groups). Thus perhaps 270 person days a year might have been involved in direct change efforts, *exclusive* of the actual implementation time for the innovations involved.

In general, then, this work was innovation-specific and aimed basically at teaching technology. As such, it could be expected to impact directly on students and their learning, both cognitive and affective. Connett felt that LINK agents (himself, Ralph Parish, and Linda McNeely notably) occasionally provided some direct teaching on the change process, adoption issues, barriers to implementation, etc. Little or no direct work was done at the interpersonal level (except for occasional visits of individuals to outside workshops). We should note too that no direct attention was given to organizational or system-level issues *as such*: the innovations were "in", not "of" the system. The work was also explicitly defined as initially located within specific buildings; success led to diffusion to other buildings to some extent. But the work was not "centrally" coordinated in the same way that of the Curriculum Council was.

Typically, the initiation of any particular project seemed to involve active support from Stones, who felt concerned about issues such as the general level of reading achievement; the interest of a particular principal; and (often) the stimulation and direct recruitment efforts of LINK personnel, sometimes in response to the availability of a specific grant or the exigencies of new projects involving other districts.

We shall have more to say below about the effects of these programs; here it is perhaps enough to note that, in general, the innovations appear to have been carefully chosen to meet real needs in the schools and the implementation process reasonably thorough, with some attention to training of internal trainers.

---

* It should be noted that about 20 days of this time (and $4,200) went to one project (Wisconsin Design reading at Alta Brown school). For this project, LINK was part of a larger NIE-supported study experimenting with more-intensive forms of linking work and their effect on utilization of educational products. It appeared far more typical for LINK staff members to spend 3-5 days on the adoption of any particular innovation.

In some contrast with most OD programs, the local district actually received dollar subsidy and in-kind support (salaries of linking agents) from an external change agency. External support is not rare in OD programs, many of which involve federal or state grants. But here external change agents were not only providing their services free, but providing the district with modest add-on moneys for materials, training, travel and the like

In the following sections, we successively discuss program purposes, reasons for success, the problems and hindrances encountered, the role of consultants, and the overall impact of the programs. For each of these topics, we discuss the council structure and the KEDDS/LINK-mediated innovations separately.

Program Purposes

The Council

How did participants view the aims of the Council? The main emphasis in interviews seemed to be on communication and coordination:

> People should have a better concept of the curriculum, know what has been done prior to their own grade level. Coordinate the language arts program K-12.
>
> Better understanding of instruction K-12. Know who's responsible for what.
>
> Know what's being taught at each level. More knowledge about what's being done across the board.
>
> Once we have it down in writing (the curriculum) and get the testing [clear] there will be a real advantage to teachers. They'll know what they don't have to cover.

Secondarily, there was a focus on the active, deciding aspects of the Council. A teacher said that it should set in place a sequence of skills to be learned. And a LINK staff member said it was aimed at getting a regular curriculum in place. Perhaps most importantly, Charles Stones saw it as an "over-all directional vehicle".

Another LINK staff member said the goal was "broad-based involvement -- finding a better way to do things, both in terms of curriculum and ongoing problem-solving". (He seemed to think that this general purpose encompassed both the Council work and the innovation adoptions.) His view was that "the process" tended to become more important as a goal the longer the work proceeded. However, the district participants did not seem to mention this directly. (As we shall see, when asked about program consequences, participants did in fact note that process gains had occurred.)

The assistant superintendent's view that the Council's mission was to keep curriculum work "professional" and away from contract negotiations should be recalled here.

The Innovations

Perhaps naturally, most interviewees left the question of larger goals tacit. The innovations were designed to correct unsatisfactory conditions (poor reading achievement, lack of a systematic program for learning disabilities, etc.). One person stressed that "we wanted to have a tested program that was known to be effective", an allusion to the fact that NDN programs are "validated".

As we have noted above, only the LINK staff member commented on the importance of learning about adoption and educational change processes. Participants tended to be mainly interested -- often with much enthusiasm -- in the content of the specific innovation at hand.

Reasons for Success

The Council

When asked what factors aided or helped the work at various stages (and what accounted for the degree of impact attained), participants identified several. Most central, perhaps, was the role of Charles Stones.

> Everyone knew how he felt; he was in favor of meaningful changes. He's a strong force, and doesn't want to be directive.
>
> His leadership. He could see the whole scope. He's very persistent.

Other organizational supports were also mentioned, including the receptiveness and support of the Board and the fact that the superintendent is a "curriculum supporter" and provided Stones with full latitude.

Staff involvement was also seen as important by several:

> Everyone had some input. Staff involvement began small and expanded.

The Innovations

Here too involvement was mentioned, but naturally the specificity of the work made a difference:

> The teachers all agreed that we needed a new management system for the reading program.
>
> They bought in, were concerned. It really has focused in on the [reading] problem; they had wanted something more focused.

> They were participants, not spectators. They owned the process.
>
> We worked with the teachers who were ready to go. Others were skeptical, but learned as we went. When we invited the whole staff in, the majority fell in line. Even the draggers came along.
>
> It's oriented to real needs.

The results of particular projects seemed to make a difference in subsequent projects. In one LINK staff member's view, the fact that some of the stronger elementary principals had been closely involved with innovation projects, successfully so, made for more diffusion as they influenced their peers. (In passing, we should note that all but one LINK-mediated project occurred at the elementary level: it also seems true that the junior high and senior high principals have expressed the most reservations about the Council's structure and functioning.)

The support provided by LINK staff was also mentioned, including the provision of training materials; money for trips; direct support by the linking agent; making information available on "known validated projects", like 15 samples of reading projects. But the relationship was not that impersonal; one teacher commented on Jim Connett's style:

> His way of working is good. His nature is to draw people's feelings out. He moves away from the frivolous. Yet he doesn't impose.

And from Jim's point of view, after he noted that "everything has worked a bit better here than in most places", he explained:

> There's a friendliness and openness between us. Even some lasting friendships beyond the professional base. They are curious, open people. And they have control over their own destinies.

(We discuss LINK staff member roles further below.)

A LINK staff member offered one additional explanation for the success of the innovation work: low risk. He felt that the approach was non-threatening, with few risks involved. Participants could "exit" if they wished (either individually, or corporately, so to speak). That is, it was not seen as necessary that any particular adoption be made. However, the prospect of success, given the existence of validated programs and a variety of supports, was reasonably high.

Problems and Hindrances

The Council

Several people said the Council's task was complex and ambitious:

> It's an awesome process. It ought to be simpler but probably it can't.
>
> It's a terribly big job. For example, having "teeth" [follow-through on teachers' use of the curriculum] would scare the living hell out of the Council. But we ought to be holding teachers accountable.
>
> There are time problems. The ones on the Council sometimes can't get time for meetings, get on people's calendars.

Not surprisingly, not all teachers carried out their new role responsibilities:

> Some coordinators didn't carry through with their department heads.
>
> Teachers are busy and it's hard for them to meet their obligations to the Council. And not all teachers can do it. So some have come through, and some have done little.

There seemed to be few comments about Council meeting processes (size large, discussion getting off issue). The most frequently discussed problem was ambiguity about the Council's decision powers. A few felt it was too easy for principals to "shoot down" proposals, particularly since the upper-level principals tended to be more resistant to the idea of the Council itself - or to proposals, some felt, which would "erode their power". In December of 1977, Jim Tomayko, the director of the alternative school-within-a-school, submitted a proposal that would alter Council procedures to provide for more upward influence.

The existing scheme (see Appendix A) provides for submission of Council proposals to the principals as a group; if approved they go to the superintendent for action. Rejections invite revision and resubmission to the principals; if a revision is still rejected by principals, the revision is forwarded to the superintendent with their opposition noted. Decision power rests with the superintendent.

The Tomayko proposal attached this provision:

> "If approved [by the Superintendent] it goes to the Board of Education. If rejected [by the superintendent]

> the person or group making the proposal will have the right to present their proposal to the Board with the superintendent making his dissenting report."

After some discussion, the Council approved this addition 17-2; both dissenting votes were those of administrators. Thus some increase in clarity about the Council's legitimate influence occurred.

Charles Stones' view of the Council at the time of the site visit was that "the honeymoon was over" and that the Council would have to prove itself free of the "halo effect" that had attended its launching. And there was the risk, it seemed, that the Council might still be depending too much on his initiation and energy.

Though he said that "if we set goals [through the Council] we will expect those goals to be met", he noted that the Language Arts goals just presented had not been formally approved yet, were a "teaching plan"... we're feeling our way." So the question of "teeth", probably wisely, remained a bit uncertain at that point.

The Innovations

Timing issues were mentioned by a few people: one principal was initially worried about pace and wanted to press faster, and another person thought the initial activities (setting criteria for adoption decision, needs assessment, etc.) were too leisurely. An overload of requests to LINK sometimes slowed their turn-around time.

There were a few others mentioned: delay in getting or producing needed materials; orientation of secondary teachers and administrators to "subject matter" rather than students (seen as an explanation for the minimal use of LINK-mediated innovations in junion high and high schools).

On balance, however, the work was seen as moving well with few hindrances.

Consultants

The Council

Outside consultants As we have seen, the two administrators who conceived the Council did not utilize outside assistance in its design as such, though two State Department specialists supplied some assistance on issues of curriculum planning and goal specification. LINK staff members Ralph Parish and Jim Connett were kept informed, and may have supplied some encouragement. Neither had attended a meeting of the Council by the time of the site visit.

Inside consultants In the site questionnaire, Stones listed a total of 31 people, including 4 principals, 20 teachers, 1 psychologist, 5 parents, and 1 central office administrator. This seems to refer to those who took prime leadership in the Council, the innovation adoptions, or both. The questionnaire also described the work of two teachers, Nina Lance and Carol Hodgkinson, (about 8-10 days each) who provided leadership in the language arts revision, and the reading area. When interviewed, Stones also mentioned Jim Tomayko and Jon Hoerman as initiative-taking "idea men', and Susan Taylor as having exerted leadership in elementary science. The main dimension he appeared to be using was that of substantive, content-focused leadership in curriculum change efforts.

When interviewed, Jim Connett mentioned Stones first (as having been the prime mover in designing and putting the Council into place). His other nominations were all related to the LINK-mediated adoptions.

The Innovations

Outside consultants. Three were mentioned. Ralph Parish, the LINK director, worked on the PLD project from early 1974. Beginning in 1975, Jim Connett worked on the Alta Brown reading project and a range of others; Linda McNeely also served as a linking agent on several projects.

Charles Stones' view was that LINK staff, generally speaking, aided with needs assessment, located validated programs, provided pre-adoption visits to see how a prospective innovation worked in practice, aided with adoption decisions, and gave in-service work after the innovation was put in place. Generally: "they provided leadership all the way through."

Jim Connett seemed to be the most salient LINK change agent as far as site people were concerned. In addition to functioning like those described above (and those of running ERIC searches, supplying materials, etc.) a recurrent theme was that Connett had supplied leadership:

> He didn't let us flounder. Said, "I think we need to do this, this and this."
>
> He kept us going, gave us ideas. The teachers look at him as an expert.

But he was not seen as dominating:

> He created an atmosphere where the committee, and the whole staff, could make decisions for themselves. He told what LINK could provide, but the decisions were made by people here.

And he was seen as supplying support:

> Last meeting we panicked, feeling that things weren't getting done. He said that was O.K., sort of reassuring, like a mother.

> I worried when we bogged down. But I finally decided to go slower. Jim helped with that. I learned you don't have to hurry. We might have discouraged teachers, or have it fall flat.

Connett's view of what LINK staff (including himself) had been doing was that they performed several functions:

--working closely with inside change agents ("we are in effect assistants to Chuck Stones")
--sounding board for thinking through issues
--providing material and human resources
--helping analyze local data on needs for change
--supplying process assistance if a group was having difficulty
--some process teaching (ex: in-service course on decision-making)
--building local capacity to continue

We shall return to the question of process work and capacity-building, both aspects of change agentry which seemed somewhat more visible to the change agent than to his clients in this setting. In any case, it is clear that the role has plenty of content emphasis, and a fair amount of initiative: it is not simply a "catalytic" one.

Connett's background is unusually rich and diverse. He studied pre-med and pre-law, worked for six years in television, began public school teaching in 1959, did graduate work on the history of aeronautics (he is a licensed pilot), and has held city and statewide educational association offices. In 1970 with Ralph Parish, he created an innovative project (DEEP--Diversified Educational Experience Program) and helped diffuse it to 16 schools in several states. In the late 60s he spent two years trouble-shooting Black-White conflicts in an urban high school. He served as a social studies coordinator in a large city, and began as a LINK facilitator in 1974. He commented that his background provided him with a good deal of security as a change agent.

His primary training has been "learning as we go, learning by analysis and critique". This has come from other LINK staffers, and from meetings with other linkers in the larger project of which the Alta Brown project was part. In 1975 he and Ralph Parish aided Miles in the design and operation of a workshop on the development of experimental linker training programs. He is a member of the American Educational Research Association, but of no formally-constituted change agent or consulting association or network. He has not had university training as a change agent. In his case, it appears that on-the-job learning and a strong background in education and other occupations has provided as effective base. The testimony of his Garden City clients strongly favors his effectiveness.

Inside consultants. Except for Charles Stones, Garden City staff members tended not to identify others as "change agents". Connett named several in addition to Stones: Jon Hoerman and Darryl McVey (principals) and Pansy Fryman and Dortha Bieber, who had developed as effective in-service trainers on the Pegasus-Pace program. In an interview, Dortha Bieber explained that she had carried out (with some materials and arrangements support from Connett) a workshop for another school district, as well as workshops for Buffalo Jones, Friend, and Lincoln schools in Garden City. She was enthusiastically continuing to develop Pegasus-Pace resource files, and after her coming retirement from Garden City expects to do college teaching and consulting.

Impact

The Council

Consequences. When asked about good, expected consequences, several gave organizational-level outcomes:

> For the first time, I've seen people at all levels think and work together.
>
> Good information transfer. And it did force a better organizational structure in the schools (for example, ending the old rotating department chairmanship).
>
> There's more teacher input. Things come back to the building. We try out textbook series at the building level.

And there was naturally mention of content accomplishments as well:

> We came up with a language arts scope and sequence. It's better coordinated. We found the duplications.
>
> Textbook selection is more organized.
>
> We found we were trying to cover too much at the elementary level.

There were few unexpected good consequences, except for the degree to which people were able to work together. So far the Council's work does not seem to have had direct, traceable effects on student learning, except as generally noted above.

The only negative consequences noted were occasional wheel-spinning, and the request of a member to be relieved of Council responsibilities. One person noted that there were more meetings than before, but then said, "But they're good."

Institutionalization. What will the future hold for the Council? One person said:

> We have great hopes. It's the best thing that's happened to the district.

And several were confident:

> It's successful, is getting going well, and will continue. Chuck Stones' energy will make a difference.
>
> It will continue. Action on its reports to the Board will give it more power.

There was also caution:

> Teachers don't speak up enough. Some difficult questions are coming: are we going to have competency exams? Are we going to test for objectives? I'm pessimistic -- whoever can stand up last wins.
>
> The curriculum council will experience growing pains. There's still this inbred fear: will our decisions be overturned?
>
> It depends on whether the principals can really veto things, and the quality of what goes to the Board. I'm somewhat more fearful than confident.

On balance, it seems likely that the Council structure will continue, with . Stones' active furthering. It is reasonably budgeted, has Board support, and aids coherence and coordination. As Stones pointed out, the $600 salary increment for its members is hardly a large incentive, and it is hard to know what will happen after the "honeymoon". But the structure seems well launched.

Near the end of the site visit, when asked for feedback, Miles commented that the Council seemed (a) not particularly linked to the various building-specified projects; (b) potentially in need of process assistance as decisions got bigger, more difficult, and more organizationally impactful. He suggested that involving Jim Connett as a facilitator for the Council might be valuable on both counts. Stones felt the suggestion was useful, and acted on it; Connett worked subsequently with the Council to help it set basic goals in four areas: curriculum guide development, information-sharing, team-building, and encouragement of change in the district. (See Appendix D.) Follow-up work is contemplated.

The Innovations

Consequences. As might be expected, when asked about good consequences that had been expected, several focused on the properties of the innovation involved:

> Teachers became more aware of learning-disability problems.
>
> We can see needs of individual kids, group them and sort them, put them at a level where we can see achievement. We can show parents results in black and white -- the level their child is working at.

But others pointed to organizational effects:

> It enhanced communication within the staff; we saw movement from "it won't work" to full support. We really focused in on the reading problem.
>
> It made us take a good look at the school. We were nil on parent involvement, for example. We found kids were doing better than we thought.

Jim Connett was even more positive:

> The programs are good, successful, and the process was better. In the district there is now a way to look at ourselves, make decisions together. Teachers have been actively involved.

Connett may have been alluding not only to the work at the building level, but to the Curriculum Council, which he considered an important support structure. But that was not wholly clear, and the impression from teacher and principal interviews is that the innovation-specific learnings tended to be more salient than those about educational change and improvement.

Unexpected good consequences reported varied: improved achievement test results at Gertrude Walker school; an individual's getting "recharged" and more confident in the reading skills area; the emergence of strong internal trainers.

Negative consequences were minimal: the large time investment at Alta Brown, negative reactions of pupils to the testing involved.

Specific student effects were noted, as might be expected from instructional innovations (ex: reduced incidence of fighting after implementation of Project Me; improved achievement of learning-disabled children; and the achievement effects noted above). Connett pointed out that there were no firm evaluation data where programs were operating, but believed that the work with teachers and administrators had "rubbed off" on students: adults were taking a more "affective emphasis", he believed.

Institutionalization. The impression gained was that most people tacitly assumed that the particular innovations installed would continue, but this was rarely spelled out. The question of the institutionalization of the relationship with LINK was clearer:

> We feel physical isolation from the universities and other sources of help. Professional people are eager to do their best, hence the need for linkage to information.

And Charles Stones said:

> Every school needs linkers. They have the clarity of the outsider, can help us analyze. Just looking at an abstract of a particular program is not enough.

But he acknowledged that LINK's continuing presence would depend on available funds.

The current relationship between the district and LINK is close and active, and not limited to current projects. For example, over lunch during the site visit Stones asked Jim Connett whether there were programs on dropout prevention. Connett immediately described four or five, and also responded to a similar question about junior school scheduling methods, suggesting a visit to a junior high school, as well as to a question about needs assessment methods.

For his part, Connett was optimistic. He believed the programs would continue "even if LINK went away", though they might slow down. And they would be hard to shift, he felt, even if Stones were no longer in the district. And as we have seen, he felt that district people had learned a sort of self-analytic change process.

Connett explained that his philosophy was to spend about a third of his energy helping people pick up specific innovative programs, with the remainder of his time devoted about equally to short term and to durable-level organizational process issues.

But it did not seem wholly clear that there had been increases in organizational self-analytical improvement abilities. One active principal and a teacher said the main learning had been: "When you have a problem, go to LINK." Other comments included:

> You really need an outsider; they can direct you, lay it on thicker. When I speak up in the Council, other people seem to be implying "Who does she think she is?"
>
> I don't know if they can keep coming to the district, but we'll keep using them if we can.
>
> We probably couldn't repeat the process without LINK. Well, maybe we could if the topic was reading.

So the question of the durable residue of the LINK-mediated innovations is not decisively answered. It seems reasonable that any school district should maintain regular relationships with information services and helpful change agents. And there is no doubt that the innovations brokered in Garden City produced somewhat enhanced local capability (especially in the form of local trainers with innovation-specific skills). What is not certain is how much organizational self-improvement capability was induced, particularly since the innovation work was done initially on a building-specific level. Diffusion of the innovations to other buildings is occurring, but not necessarily diffusion of the process by which they were adopted in the first place.

Concluding Comments

The work in Garden City represents a structural approach to organizational improvement, one focused fairly directly on organizational tasks (that is, goal-setting, coordination, and the introduction of new teaching technology). The relationship with Project LINK can also be seen as a semi-permanent structural change.

In its own terms, the approach appears to be reasonably successful. The Council has been successfully launched and will probably continue. The specific innovations adopted probably will too, and are diffusing to other schools in the district. And it appears that certain organization-level variables have changed (clearer communication and coordination, increased participation in decision-making, greater ownership of decisions). The approaches taken in the Council work and the innovation-adoption work have been congruent and mutually reinforcing.

It is fair to say that the organizational changes at the district level are moderate, and largely limited to the elementary level; this seems true both for the Council and the innovations. Both sorts of changes have relied very heavily on the energy, commitment and skill of the central inside change agent and the main outside linker. Outside funds and time have been donated to the district by the external linkage agency. Though large amounts are not involved (perhaps $15,000 over three years), the question arises whether the present work could continue without subsidy.

On balance, working through the curriculum makes sense: it is directly focused on primary organizational tasks, is possibly less risky than more classical forms of organization development, and is easy to justify to Boards and external publics. But we cannot escape the question of what has not been done in this approach.

Our original definition of OD in the questionnaire sent to sites said that it was:

> ...a sustained effort at system self-study and improvement, focusing on change in organizational procedures, processes, norms or structures, using behavioral science concepts.

The work in Garden City has been sustained over the past four years, and it has indeed involved attention to procedures (such as management systems for reading programs), processes (such as Council decision methods), norms (such as wider involvement in planning) and structures (such as the Council). It is fair to say, however, that (1) the work has ordinarily involved a "vehicle" of some sort, with organizational issues and processes not being focused on directly and explicitly; and (2) the work has ordinarily focused on the formal aspects of the system, with little attention to the informal, psychosocial aspects (such as climate, behavioral norms, conflict management, the operative reward system, and so on). So in this sense organizational issues have not been confronted "head on", so to speak.

Too, it seems that "behavioral science concepts" have not played an important part in the effort. Most OD efforts involve use of organizational-level concepts: they are often taught to participants, serve as a sort of map for specific strategic steps, and help individuals become more fully aware of their organizational environment, make sense of their own experience and increase their own sense of "fate control". In this setting, while participants learned some concepts about innovation-adoption and implementation, they do not appear to have been exposed to concepts bearing on organizational functioning more generally.

Thus the work at Garden City might be seen as standing somewhere between traditional curriculum-improvement efforts and "classical" OD. It has accomplished a good deal, without much risk, and without large expenditures of time and money. It also seems likely that institutionalized self-renewal of the district still lies ahead, and will probably require more direct, coherent attention to organizational issues as such.

APPENDICES

Appendix A: Curriculum Development, and materials related to Council's mission

Appendix B: Links of Language Arts (Sample pages)

Appendix C: Agenda and minutes of Council meetings

Appendix D: Goals for Council

CURRICULUM DEVELOPMENT

Basic responsibility for curriculum development is assigned to the Superintendent of Schools. The Superintendent delegates this responsibility jointly to the individual school principals and the Director of Instruction. Responsibilities of the Director of Instruction toward curriculum development include:

1) Providing leadership to the schools individually and systemwide;

2) Coordinating the planning and decision making, so that a common direction of action is provided for the school system;

3) Working with principals and teachers of the individual schools in adapting the curriculum to meet the needs of all students;

4) Communicating information provided by individual principals, teachers, or school staffs to other school staffs who might effectively use such information;

5) Communicating to the schools information which affects systemwide agreements and plans for curriculum development.

The Board of Education encourages the administrative staff to develop appropriate procedures to implement a systematic program for continuous K-12 curriculum development and evaluation.

Adopted June 4, 1973 (THIS PAGE)

IFA

USD 457, Garden City, Kansas
DISTRICT CURRICULUM ORGANIZATION

Department heads will be selected in the various schools to assist the principal in program development. The position of the department head is one of extreme importance because of the need to determine program requirements, instructional stipulations and to develop programs appropriate for the students of tomorrow. Continued development and improvement is essential for a school to show progress appropriate to the changing times.

From among the department heads, department coordinators will be selected and asked to consider objectively the district needs and assist in developing the program from kindergarten through twelfth grade. The vocational and special programs coordinator will not be required also to be a department head. Other coordinators will be selected who represent departments existing at only the secondary level with responsibility for grades seven through twelve.

Departments represented by but one person will not have a department head assignment, even though that department may have district or secondary representation on a district department level.

Resource services represented by the libaraians and counselors will provide resource help to all departments.

BUILDING DEPARTMENT HEADS

Departments with department heads will be as follows:

SENIOR HIGH		JUNIOR HIGH		
Department	Staff	Department	AHJH Staff	KHJH
Mathematics	5	Mathematics	5	5
Science	5	Science	3.5	3
Social Studies	8	Social Studies	5	4
Language Arts	10	Language Arts	5.5	5
Home Economics	3	Home Economics	1.5	1.5
Business	7	Industrial Arts	2	2
Vocational Agriculture	2	Art	1	1
Counselor	3	Counselor	2	2
Fine Arts	3	Music	1.6	1.5
Foreign Language	3	Physical Education	3	3
Industrial Arts	5			
Physical Education	2			

The larger elementary schools will have two department heads. One person will be responsible for reading and language arts, and the other person will be responsible for mathematics, science and social studies. When an elementary school department head is selected to serve as a department coordinator, a second person will be selected to represent the remaining areas of instruction in that building.

The smaller schools administered by one principal will have one department head in each school. A department head in one school will be responsible for the reading-language arts in both schools while the department head in the other school will be responsible for the science, math and social studies in both schools.

Elementary school department heads will be as follows:

School	Department Heads	Staff
Alta Brown	2	14
Buffalo Jones	2	15
Garfield	2	13
Georgia Matthews	2	14
Gertrude Walker	2	13
Jennie Wilson	2	13
Hutchison	1	6
Theoni	1	4
Jennie Barker	1	7
Friend	1	3
Pierceville-Plymell	1	4
Lincoln	1	4

Elementary music and physical education will each have a department head selected to be responsible for coordination of these activities.

DEPARTMENT HEAD RESPONSIBILITIES

1. Work with the principal in designing appropriate department head responsibilities for the specific department, and carry out these responsibilities.

2. Serve as chairperson for the department and call meetings to study student need, to develop program, and to develop educational processes.

3. Assist the principal in program development.

4. Work closely with the district coordinator.

5. Provide leadership in the development or selection of a means to measure student achievement.

6. Serve as the building chairperson for textbook and major materials selection.

7. Be responsible for such aspects as seeing that inventories are taken, assisting with teacher interviews and assuming budget responsibility for the department.

DEPARTMENT COORDINATORS K-12

From the department heads in the district will be selected a District Department Coordinator to systematize district wide program in that area of concentration from K-12 or where applicable from 7-12.

The District Department Coordinators will meet a minimum of one time per month with the Director of Instruction, the high school principal, the junior high school principal and two representatives of the elementary principal staff. Their main responsibility will be the improvement of curriculum within the system.

The K-12 department coordinators will be selected from the building department heads in the following areas:

1. Language Arts
2. Mathematics
3. Music
4. Physical Education
5. Reading*
6. Science
7. Library
8. Social Studies

* A Title I respresentative will meet with the Reading department.

Grade 7-12 department coordinators will be selected to systematize the secondary program in certain areas of concentration. These department coordinators will, in addition to other identified responsibilities, meet on a monthly basis with the K-12 Coordinators.

Secondary department coordinators are to include:

1. Vocational
2. Foreign Language
3. Art
4. Industrial Arts
5. Special Programs**
6. Counselors

** A representative from SDLC, VOE I and II, Bilingual Bicultural and Special Education will meet with the Special Programs department.

DISTRICT DEPARTMENT COORDINATOR K-12 RESPONSIBILITIES

1. Meet with the Director of Instruction, high school principal, junior high principal and two representatives of the elementary principal staff on a monthly basis or more often as needed.

2. Develop and study appropriate data to help determine district needs.

3. Assist in the development of district goals.

4. Meet with department heads to coordinate activity and to develop district wide curriculum understandings for each department as well as for all departments.

5. Plan and design in-service programs.

*SUPPLEMENTARY PAY SCALE

S-2 1. Department head responsible to a department with from two to four staff members.

S-3 1. Department head responsible to a department with from five to seven staff members.

S-4 1. Department head responsible to a department with eight or more staff members.

2. District Department Coordinator responsible to departments contained only at the secondary level.

3. District Department Coordinator responsible to a total of five or fewer department heads K-12.

S-6 1. District Department Coordinator responsible to six or more department heads K-12.

Principals participating on the District Curriculum Council will receive supplemental pay at the S-4 level.

Approximate number at each level:

SCALE NUMBER	NUMBER OF PERSONNEL
S-2	10
S-3	7
S-4	18
S-6	7

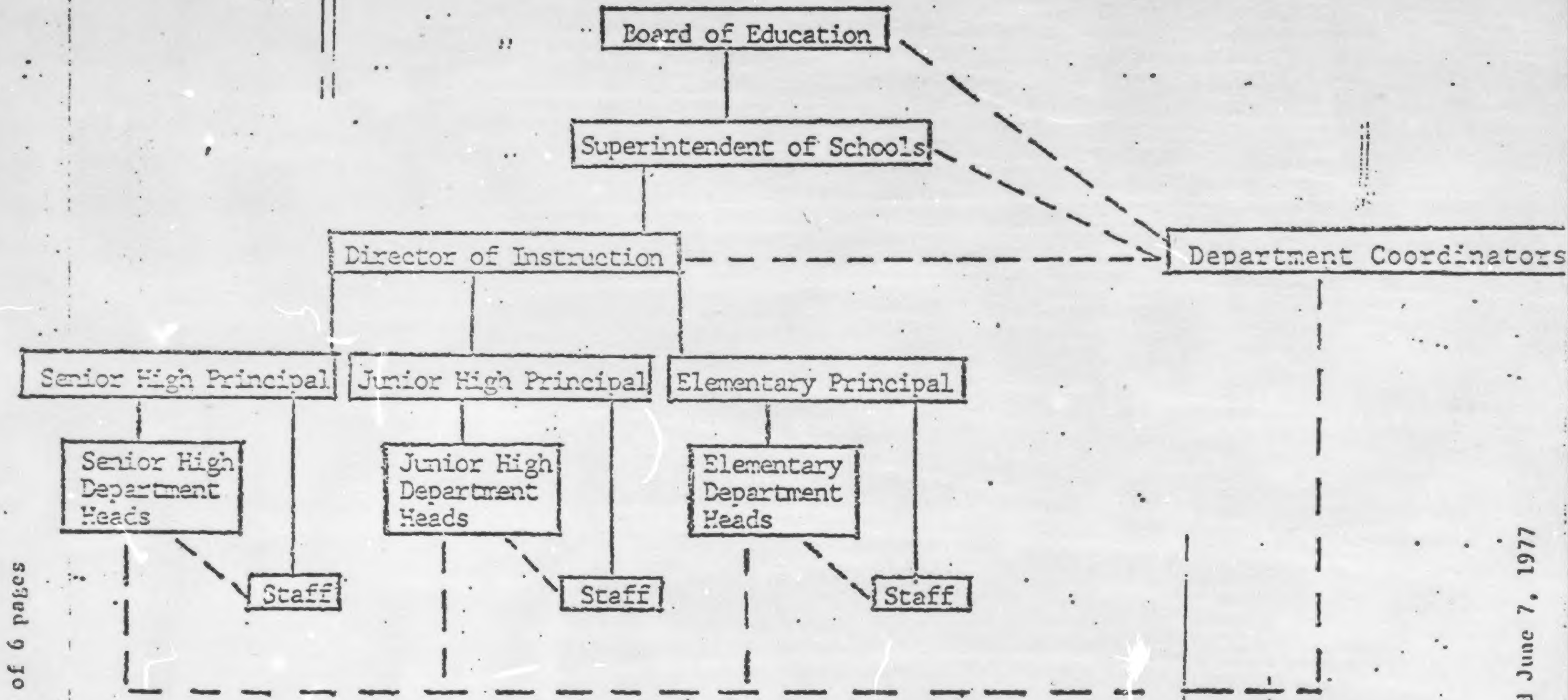
*No staff member will qualify for more than one scale. Example: A department head who is appointed District Department Coordinator will be paid on the District Department Coordinator step but will continue to serve as the department head in the attendance center as well as District Department Coordinator.

SELECTION PROCEDURES FOR BUILDING AND DISTRICT DEPARTMENT HEADS

1. Building department heads are to be recommended by the principal to the Superintendent of Schools for final approval. (To be completed prior to May 1).

2. District Department Coordinators are to be selected from the department heads by the Director of Instruction for recommendation to the Superintendent of Schools. (To be completed by May 10).

F. ORGANIZATIONAL CHART
FOR
CURRICULUM COUNCIL


Board of Education
Superintendent of Schools
Director of Instruction
Department Coordinators
Senior High Principal
Junior High Principal
Elementary Principal
Senior High Department Heads
Junior High Department Heads
Elementary Department Heads
Staff
Staff
Staff

Adopted June 7, 1977

CURRICULUM REVISION PROCEDURE

Curriculum development to include goals, objectives and materials selection will be conducted in an orderly and consistent manner. The study cycle for course development will provide the principal and the department will advance direction as to when a major study concentration should be made.

Minor revisions, as needed, will be made yearly, with extensive revisions being developed in congruence with a specified rotation schedule.

The rotation schedule will provide a time line for departments to perform the following tasks:

1. Develop school terminal goals
2. Develop course goals
3. Study and revise (if needed) the toal curriculum package
4. Prepare the budget request to meet the course needs for the rotation year

The above four activities will provide direction and assurance to a department within a building relative to what is expected in curriculum revision and will also assure the department that funds will be available for major textbook revisions during the operating year if this need is identified.

ELEMENTARY, JUNIOR HIGH AND SENIOR HIGH

STUDY CYCLE FOR

CURRICULUM DEVELOPMENT

School Year For Curriculum Development	K - 12	7 - 12
1976 - 1978	Language Arts	Woods/Special Programs
1978 - 1979	Fine Arts	Metals/Home Economics
1979 - 1980	Mathematics	Automotive
1980 - 1981	Social Studies	VoAg/Foreign Language
1981 - 1982	Science, P.E., Health	Business

PROCEDURE

As curriculum areas rotate to the year of concentration the following procedure and time line will be followed:

	TIME LINE
1. Development of school terminal goals A. The curriculum coordinator in the area of concentration will work with the department heads and the administration to develop terminal goals. The goals are to complement and extend the Board of Education goals. These are to be broad goals developed to identify the desired outcomes at the close of thirteen (13) years in the USD 457 schools. (Needs assessments should be conducted prior to the development of the goals). B. These goals will be evaluated by a panel of lay people to include one patron from each attendance center K-12. The suggestons made by the panel will be evaluated and incorporated within the goals and approved by the district advisory council before they are presented to the Superintendent of Schools and the Board of Education.	September 1 to January 1 (The school year preceeding the materials selection year)
2. Development of course goals A. Professional help outside the school district will be sought to assist the department curriculum coordinator, the department heads and the administration in the development of specific course goals for the district. B. Check points for program evaluation will be developed to be used at the end of K, 3, 6, 9 and 12. C. Critial skills will be identified for mastery by the close of grade nine (9).	January 1 to August 1
3. Department heads will review the course goals with the principal and the building staff before final department approval and before these goals are presented to the Council and the Superintendent of Schools.	August 1 to October 1

4. Materials for review purposes (if new materials are needed) will be requested by the department curriculum advisor or by the director of instruction at the request of the department curriculum coordinator.	May 1 to September 1
5. Review of materials	September 1 to October
A. The curriculum coordinator will distribute the review materials to the department heads who will share these with the teaching staff in every building affected by a materials change.	
B. Each department head will share staff ideas about the material with the district curriculum coordinator and all other department heads.	
C. The curriculum coordinator and department heads will hold an open staff hearing on materials recommended by the department.	
6. The curriculum coordinator and department heads, after a review of concerns expressed in the open staff hearing, will make a materials and budget recommendation to the principal staff. (Require the firm to guarantee the materials price through September 1 of the following year).	November 1 - November
7. Should a majority of the principal staff reject any part or all of the program package, a written report identifying their concerns will be submitted to the department curriculum coordinator who will study the report with the department heads. If, on the other hand, the department recommendation is approved by the majority, the recommendation will go to the Superintendent of Schools.	January 20
8. Any recommended change to come from the department as a result of principal recommendations will be presented to the principal staff who will review the new recommendation and accept or reject.	January 20 to Februar
9. If the recommendation is rejected by the principal staff a second time, they will attach their opposition report to the department recommendation and submit the program package to the Superintendent of Schools.	March 1 to April 1

10. The Superintendent of Schools may approve or reject the proposal. 2nd Board Meeting in A

11. In-service training will be planned and provided by the curriculum coordinator and department heads to meet the needs of the department.

12. Recommendations from individuals or groups outside the council for yearly revisions of program (to include major materials and budget) will be acted upon by the department coordinator together with the department heads of the area. A recommendation may go to the department coordinator from any member of the instructional or administrative staff.

13. All recommendations relating to increase or decrease in certified staff will be the responsibility of the principal staff.

14. All program packages recommended to the Superintendent of Schools shall include:

    A. The present number of teachers.

    B. The number of students presently affected.

    C. The number of teachers or amount of material requested. (This may represent an increase or a decrease).

    D. The number of students to be served by the increased or decreased investment.

    E. The effect this request will have on existing space.

    F. Total budget required to meet the request.

Approved June 6, 1977.

[redacted] ne [redacted] 977 [redacted]

CURRICULUM DECISION MAKING IN USD 457

	BOARD OF EDUCATION	SUPERINTENDENT OF SCHOOLS	ASSISTANT SUPERINTENDENT	BUSINESS MANAGER	DIRECTOR OF INSTRUCTION	PRINCIPALS	DISTRICT COORDINATOR	DEPARTMENT HEADS	STAFF	STUDENTS	PATRONS	CAC	
S ASSESSMENT	A	V	P	S	R	P	P	P	P	P	P	R	
S FOR A DISCIPLINE	A	V	I	S	R	P	R	P	C	S	S	I	
RIALS SELECTION	V	V	S	I	P	P	R	P	P	S	S	S	
RIALS ORDERING	S	S	S	I	E-A	R	S	P	P	S	S	S	
F TIONS OR DELETIONS	A	V	P	S	S	R	S	S	S	S	S	S	
E ALLOCATION	A	V	S	S	S	R	S	S	S	S	S	S	
ERVICE	I	V	I	I	A	C	R	P	I	S	S	P	
ET	A	V	R	C	R	P	P	SEC P	S	S	S	S	

E-Elementary
S-May recommend or suggest
C-Must be consulted

Sec.-Secondary
I-Must be informed
P-Must participate

V-Veto Power
A-Authority to make decision
R-Responsibility to initiate and complete

PRIMARY WRITING

I. PUNCTUATION

A. The student knows that a period is used at the end of a statement, an abbreviation, or initials.

B. The student knows that a question mark follows a question.

C. The student knows that commas are used to separate items in a series, for clarification of meaning (pause) in a date, and in an address.

D. The student knows as exclamation is followed by an exclamation mark.

E. The student knows that quotation marks enclose a direct quotation.

F. The student knows that an apostrophe is used where letters are omitted in a contraction.

G. The student knows that an apostrophe and s are used to form the possessive of singular nouns and definite pronouns.

H. The student knows that for plural nouns ending in s only the apostrophe is added; for plural nouns not ending in s both the apostrophe and s are added.

I. The student knows that the colon is used between the hour and the minutes when writing the time (9:30 a.m.)

J. The student knows that a comma is used after the saluation of a friendly letter and after the complimentary closing of a letter.

K. The student knows that a comma is used to separate a direct quotation from the rest of the sentence.

II. CAPITALIZATION

A. The student knows that a sentence begins with a capital letter and the pronoun I is capitalized.

B. The student knows that proper names, person or things are capitalized.

C. The student knows the names of the months, days, and holidays and abbreviations.

D. The student knows that proper nouns and proper adjectives are capitalized to signal the name of specific person, place, or thing.

E. The student knows that a person's title or the abbreviation of the title should be capitalized if it precedes the person's name and his name will be capitalized.

INTERMEDIATE LITERATURE

I. APPRECIATION

A. The student knows that literature encompasses a wide variety of subject and interest areas in which he may find information, satisfaction relaxation, stimulation, escape, and challenge.

B. The student is able to identify the special areas of reading that interest him.

C. The student is able to select books at an appropriate reading level for his needs.

D. The student is able to share his reading interests and experiences with others.

E. The student is able to use reading as a diversion from everyday problems (i.e., a contribution to mental and physical relaxation).

F. The student knows that there is a wide variety of children's literature: fairy tales, fables, myths, epics, ballads, legends, fanciful tales, realistic stories, historical fiction, animal stories, information,books, etc.

G. The student knows that myths are usually concerned with the activities of gods and superheroes.

H. The student knows that a legend (e.g., KING ARTHUR AND THE KNIGHTS OF THE ROUND TABLE) is a story or collection of stories handed down through oral tradition and popularly regarded as history.

I. The student knows that the tall tale builds upon the exploits of a hero through exaggeration of his size, endurance, actions, speech, and importance.

J. The student is able to use reading to identify the values of others.

K. The student is able to distinguish between fiction and nonfiction works.

L. The student knows that the short story deals with a wide variety of plots, characters, and themes.

M. The student Knows that fantasy is characterized by supernatural or unnatural events or characters.

N. The student knows that the narrator (implied author) may or may not be a character in the literary work.

O. The student is able to comprehend a line-by-line literal reading of poetry.

JUNIOR HIGH SPEAKING

I. ARTICULATION

A. The student knows that communication depends upon speaking distinctly with adequate volume for the words to be understood, and that the larger the audience, the more care must be given to articulation.

B. The student knows that rate of speech affects ability to communicate, and that normally a large audience requires a slower rate than a small one.

C. The student is able to adjust the rate of speaking to fit the needs of his audience.

D. The student knows that blending sounds too rapidly or sluggishly results in poor speech.

E. The student is able to articulate sounds and words clearly to achieve intelligible speech.

F. The student is able to control inhalation and exhalation properly to aid vocal comfort and effectiveness.

G. The student knows that articulatory mechanism includes the tongue, teeth, lips, jaw, and the hard and soft palates.

II. USE AND CONTROL OF THE BODY

A. The student is able to avoid disturbing mannerisms while addressing others (e.g., rolling eyes, shuffling, fidgeting).

B. The student is able to use accurate, varied, and clear language in speaking (rather than the cliche).

C. The student is able to use visual devices as an aid to clarity and interest (e.g., maps, charts, models).

D. The student is able to use transitional devices between main points and cue phrases to aid the listener in following a speech.

E. The student is able to use definitions, examples, descriptions, comparisons, and restatements to explain difficult terms or ideas in a speech.

F. The student knows ways in which "body language" affects communication.

G. The student is able to establish and maintain eye contact with his audience in order to gain attention and utilize feedback.

SENIOR HIGH LITERATURE

I. HISTORY OF LANGUAGE

A. The student knows ways in which political, economic, and military events and trends influence the history of languages.

B. The student knows that vocabulary changes--new words are added and old ones dropped--in response to human needs in a culture.

C. The student knows that speakers living near the boundaries of nations having different languages speak a complex dialect made up from both languages (e.g., Belgian-French).

D. The student knows that when a nation's or an individual's economic condition depends upon interaction with speakers of other languages, then language change is accelerated.

E. The student knows that most European languages were derived from the Indo-European language and that these languages constitute a family of languages.

F. The student knows that English is a member of the Germanic branch of the Indo-European family.

G. The student knows that the following events (outer history) affected the structure of the English language (inner history):

(1) Germanic tribes settled Great Britian;
(2) Danish settlement;
(3) Medieval church;
(4) Norman settlement;
(5) Chaucer's literature;
(6) Invention of printing press;
(7) The Renaissance;
(8) Expansion of British Empire.

H. The student knows the internal characteristics of the main stages into which scholars have divided the history of English (Old English, Middle English, Modern English).

I. The student knows that over a period of 1000 years speakers of English changed their language from one strongly dependent upon word endings to convey grammatical meaning to one in which word order is much more important.

J. The student knows that many words were borrowed from other languages, particularly Greek, Latin, and French.

K. The student knows that borrowing falls into two categories:
(1) erudite and scientific words of rather recent origin;
(2) a smaller but frequently used group thought of as native.

INTRODUCTION

The Language Arts Coordinating Committee has developed this curriculum as a guide for a progressive educational program, kindergarten through twelfth grade, for District #457, Garden City, Kansas.

This curriculum was developed with an awareness of the uniqueness of the Garden City community-seventeen percent Spanish, agriculture and agriculture related industry in a rural community, first class city atmosphere, and economically very high to very low. Recognizing that contemporary civilization is uncompromising in its ultimate demands on the student, every effort has been made to provide a curriculum that not only serves the student in his community but in the world and is presented in the hope that it will become a significant contribution toward preparing students for the challenges of their time.

In making the selections of skills to be covered, the committee sought to bring together teachable and challenging concepts and arranged the curriculum so that the concepts can be taught in the order given. However, it readily lends itself to other approaches. Neither the teacher nor the student deserves to be confined; no service would be done if scholarly independence were lacking. The primary importance of this curriculum is that the student is prepared to develop the needed skills for communication in his environment. The purpose is to help point a way. Every teacher must weigh, consider, and expand the skills presented. Every skill must be considered in terms of the immediate situation and the capabilities of the students themselves. The success of this curriculum, as of any educational materials, depends on the knowledge, imagination, and enthusiasm of the teacher in the classroom.

The task which this curriculum attempts is obviously impossible to accomplish fully. No curriculum could hope to "cover the grounds." The task of acquiring an education is the job of a lifetime for each person. Therefore, this curriculum is a guide to help students find ways to find answers to their questions and, as directly as possible, attempt to start the education of a free, mature human being.

Nina Lance
Language Arts Coordinator

Committee members. Dortha Bieber, Pam Brown, Nedra Heimer, Carol Hodgkinson, Lorie Jammers-Murdoch, Winifred Koksal, Wanda Maynard, Beverly Olcman, Jean Selichnow, Kitty Slover

Acknowledgments: Charles Stones, Director of Instruction, USD #457;
John Hunter and Ann Spangler, State Department of Education;
Grady Sewell, Jean Elam, Elaine Fox, Shirley Letourneau, Barbara Livingston, teachers, District #457.
K-12 Course Goals in Language Arts, A cooperative project of the Oregon school districts of Clackamas, Multnomah, and Washington Counties.

LANGUAGE ARTS CURRICULUM COMMITTEE

GOALS

Links to Language is based upon the following goals:

1. To foster and build those skills, understandings and attitudes essential to early success and continual progress in Language Arts.

2 To promote an integration of Listening, Speaking, Reading, and Writing and foster a coordination of the Language Arts with other areas of the curriculum.

3. To encourage the continuity and sequential growth of the students within the district by carefully planned sequence of material grade by grade.

4. To encourage the appreciation of the spoken and written word as a means of enriching oneself and one's environment.

LANGUAGE ARTS CURRICULUM COMMITTEE

OBJECTIVES

1. The student will express himself creatively, precisely, informatively, and be able to choose the mode most effective for his purpose

2. The student will appreciate the contributions of others in the literature and listening fields.

3. The student will develop an appreciation of the spoken word and be able to compose and develop an appropriate oral presentation.

4. The student will be able to write and speak creatively with correct grammar usage.

5. The student will use neat and correctly formed letters in his penmanship.

6. The student will learn the methods of acquiring correct spelling and pronounciation of words and use phonetic components and rules as an aid in spelling correctly.

7. The student will interpret literature as a reflection of life's value of his and other cultures.

8. The student will be able to question or critically analyze material of his own or others.

kr

USD # 457
Sequential Skill Development
Kindergarten through Grade Twelve

I - Introducing

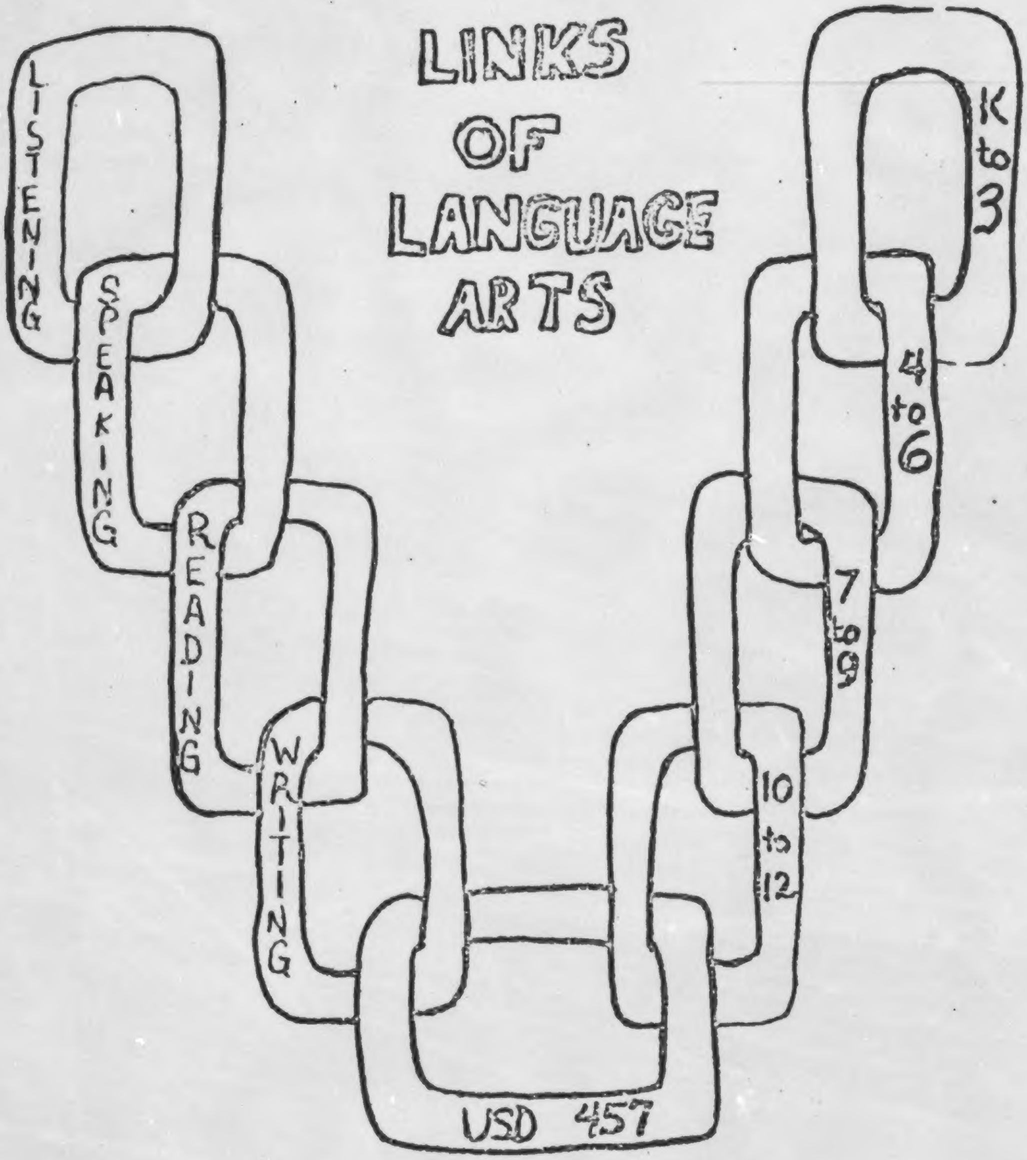
D - Developing

M - Maintaining

DEVELOPMENTAL SKILL Grade Level	K	1	2	3	4	5	6	7	8	9	10	11	12
LISTENING (SHEET 1)													
Identification of Sounds													
Screening and Selection	I	D	D	M	M	M	M	M	M	M	M	M	M
Differentiation between Sounds	I	D	D	M	M	M	M	M	M	M	M	M	M
Identification of Characters (volume) (pitch)	I	D	D	M	M	M	M	M	M	M	M	M	M
Distinguish Variations (pitch) (volume)	I	D	D	M	M	M	M	M	M	M	M	M	M
Following Directions	I	D	D	D	D	M	M	M	M	M	M	M	M
Purposes & Attentiveness													
Attitude	I	D	D	D	D	M	M	M	M	M	M	M	M
Value of Listening for Purpose	I	D	D	D	D	D	D	M	M	M	M	M	M
Specific Purpose (ideas, details, instructions)	I	D	D	D	D	D	D	M	M	M	M	M	M
Interruption of Speaker	I	D	D	D	D	M	M	M	M	M	M	M	M
Courtesy	I	D	D	D	D	M	M	M	M	M	M	M	M
Focus Attention	I	D	D	D	D	M	M	M	M	M	M	M	M
Identify "Barriers of Interference"	I	D	D	D	D	D	D	M	M	M	M	M	
Adjust Physical Conditions	I	D	D	M	M	M	M	M	M	M	M	M	
Statement of Expected information		I	D	D	D	D	M	M	M	M	M	M	
Following the Speaker's Organization								I	D	M	M	M	
Listen for Names	I	D	D	M	M	M	M	M	M	M	M	M	

APPENDIX B

LINKS OF LANGUAGE ARTS


LISTENING
SPEAKING
READING
WRITING
K to 3
4 to 6
7 to 9
10 to 12
USD 457

Garden City, Kansas
Language Arts Association

DISTRICT CURRICULUM COUNCIL October 10, 1977

The regular meeting of the District Curriculum Council was held Monday, October 10, 1977, in the Board of Education room at 7:30.

Dr. Horn and Dr. Price, in charge of curriculum and off campus coordination at Kansas State University, spent considerable time in gaining insight concerning field service needs in the Garden City area. They indicated that a questionnaire approximately one year ago showed interest so that there were summer school courses and three during the fall; there will be two courses offered during the second semester. They indicated that improper scheduling and lack of proper publicity prevented the total success of the results of the questionnaire.

They stated that the three-weeks' summer courses were the most popular and that fifty-seven different courses were requested.

Plans for future publicity include the following: by December 1, brochures will be sent to all teachers, following previous brochures during the latter part of October. By January 1 there will be newspaper and T.V. publicity; the goal is to get better information to interested persons.

The K-State representatives indicated that trends in education are emphasizing the "Back to Basics" idea and/or literacy skills.

Chuck Stones reviewed for the group the responsibilities and limitations of the Curriculum Council members. These include the following: "The honeymoon is over." We must now move into a new phase with those with whom we work. We need to watch for ways to give the department heads a greater amount of credit. We must accept the ideas of many others. Dave Craft suggested that some elementary teachers are concerned about lack of time for teaching history "in depth." Chuck Stones emphasized that it is important to invite all department heads to any of the meetings.

Betty Dague indicated a concern for some department heads who must meet three different times for "department meetings.

Bob Brock suggested that all chairmen should call/announce their meetings at least a week in advance, to be fair with people.

Chuck Stones appointed the following committee to work on a philosophy to serve as a guide for the council: Jim Tomayko, chairman; Larry Walters, Betty Dague, Dave Craft, Dorothy Jacobs.

Larry Walters indicated that the intent and purpose of this committee is to get something definite in writing, to avoid fragmentation. He suggested that all are coordinating and asked in what way they were/are doing it. He expressed the feeling that it is important for the Council to determine precisely what we are going to do."

Carol Hodgkinson reported the progress of the pilot programs in reading and also stated that the programs in spelling are working very successfully.

Nina Lance reviewed briefly some of the highlights of a meeting which was attended in Wichita recently; a speaker from California encouraged the English teachers and suggested that society has done much to affect the quality of the teacher's work in the field of English. A speaker, Charlotte Brooks, suggested that English teaching should be "one foot in the text and one foot in the work."

Marvin Hamman reported that much of the material in the shop area is in bad repair; he also told how there are problems for the students when they need to clean up at the end of the class period. A major concern is a lack of an exhaust system in the south auto mechanics room; the Council went on record as requesting the correction of this fault at once, for the safety and for the health of the students, not only in the shop area but in the entire building.

Ada Albrecht reported that work is being done to made a needs assessment in the vocational field; Marvin Hamman is working with her in this; there are possibilities for assistance, or the local people may take care of this personally.

Jon Hoerman's interest in the gifted child resulted in the development of a program which is called IMPAC--Instructor, Mentor, Parent, Accelerating Children. Betty Dague, Shirley Letourneau, Wanda Maynard, Russ Isaac, and Chuck Stones worked with him. Parents and others of the community will assist in the project, if approved for funding.

A PROPOSED SCIENCE EDUCATION PHILOSOPHY
FOR USD 457

The total public school education must include an intergrated K-12 science curriculum. Today's citizen is called upon to make important decisions which require rational, logical, decisions based upon a thorough study of personal observations, scientific data, and conflicting viewpoints. We of USD 457 seek to provide the student with the ability to cope with the rapidly increasing complexity of our society and technology.

OBJECTIVES

1. The science program will emphasize the development of process skills in science which culminate in a focus upon problem solving techniques.

   The student will:

   A. Be involved in a continuous currriculum based upon process skills ranging from fundemental to advanced.

   B. Acquire the necessary skills to do independent research and perform creative problem solving.

2. The science program will seek to encourage positive attitudes toward science.

   The student will:

   A. Be involved in a program which will emphasize success rather than failure.

   B. Be involved in experiences which are enjoyable, exciting, stimulating, and thought provoking.

   C. Be a member of a class which encourages freedom of exploration and discovery, freedom of self expression, and freedom of movement.

   D. Instructed by a teacher whose enthusiasm makes learning an enjoyable experience.

3. The development of scientific literacy by the student is an integral part of the science curriculum.

The student will:

A. Develop a working knowledge of scientific termonology and language.

B. Learn representative concepts within the various areas of science.

C. Be involved in a K-12 science program based upon a unifying conceptual structure.

D. Be involved in a program which is not needlessly repetitious and which uses a building block approach in presenting concepts.

E. Develop an approach to problem solving which includes an unbiased use of information to critically analyze situations.

4. The science program will encourage the development of active and involved citizens working to solve societies problems.

The student will:

A. Become a responsible, informed and contributing member of society.

B. Be involved in experiences which work toward solving contemporary scientifically related societal problems.

5. The science program will aid in the development of the student's awareness and concern for environmental-energy problems.

The student will:

A. Participate in the search for solutions to local environmental-energy problems.

B. Develop an understanding about the relationships between social-economical problems and environmental-energy problems.

C. Demonstrate a positive attitude toward environmental-energy problems.

D. Learn the basic concepts of ecological relationships.

6. The science program will lead to the development of appropriate lab techniques.

The student will:

A. Develop a positive attitude toward and knowledge of lab safety.

B. Demonstrate the proper care and use of laboratory equipment and facilities.

(cont'd)

GARDEN CITY SENIOR HIGH SCHOOL

GARDEN CITY, KANSAS

MEMBERS PRESENT

October 3, 1977.
DATE

Jean Dawson

Bernadine Sitts
CHAIRPERSON

Jean Elam

Pat Olson

Linda Trujillo was not present.

MINUTES OF MEETING

The members of the Foreign Language Department of the senior high and of the junior highs met on Monday, October 3.

Bernadine Sitts presented information from the September meeting of the District Curriculum Council.

Pat Olson reported that the students in her French and in her Spanish classes are doing exceptionally fine work; she indicated that usually there have been several withdrawals from class by this time but that she has had none so far this year.

Jean Dawson and Jean Elam reported concerning the French classes which they have and which they are conducting on an experimental basis.

Bernadine Sitts reported that the Latin enrollment is larger than it has been for a number of years.

There was discussion concerning coordination of the work between the junior highs and the senior high in French; the decision of the teachers was that it is difficult at the present time to determine definitely what should be done--because of the lack of experience/time in the teaching of French for the junior high age. Bernadine Sitts will check with Chuck Stones, director of instruction, concerning suggestions for procedure.

Please attach a copy of your agenda to this report.
Make sure you hand to Mr. Woodson's secretary.

SCIENCE CURRICULUM COMMITTEE

September Meeting - September 20TH

AGENDA:

I. Philosphy, Objectives

II. MAPS
    1. Developing purchasing and inventory systems
    2. Equipment Management
    3. Textbooks
    4. Workshop/In-service (survey)

III. Goals
    1. Camping/outdoor Education
    2. Health Activities
    3. Science Fair

IV. Distribution of supplies

V. Other Topics

FORMAT FOR COORDINATOR AND DEPARTMENT HEAD MEETINGS

USD #457

Garden City, Kansas

September 14, 1977
Date

Secretary

Marvin Hamman
Department Coordinator or
Department Head

Members present:

Mr. Dowell
Mr. Fields
Mr. Hamman
Mr. Trail

Review of discussion:

1. See attached copy of the industrial arts attendance, tardy, make up work and discipline policies
2. There is a "urgent" need for improvement in the auto mechanics shops for students to have acequate facilities to clean up their greasy hands.
3. A "urgent" need for an exhaust system in the south auto mechanic's shop.
4. Metal and machine shop is in desperate need of improvement in it's equipment. If no improvement can be made it is suggest, by the department, that no classes be offered for the year 78-79.
5. The Bulletin Board in the hall way of JDA-Vocational Building will be decorated by this department for the month of March.
6. School nurse responsibilities were discussed. The suggestion was made for each instructor to check with the nurse or principal for information on students in their class that may need special priviledges.
7. Ditto Machine in JDA-Vocational Building needs attention. It's wasting paper.

Please attach a copy of the agenda to this report.

COS/jb
9/7/77

FORMAT FOR COORDINATOR AND DEPARTMENT HEAD MEETINGS

USD #457

Garden City, Kansas

Tomayko
Secretary

9-13-77
Date

Jim Tomayko
Department Coordinator or
Department Head

Members present:

Crane
Jameson
Overstreet
Tomayko

Review of discussion:

The sole agenda item was a discussion of the curriculum revision procedure as Special Programs are currently up for examination.

Mr. Jameson stated that he thinks that it is difficult or impossible to do a decent job of curriculum planning because the programs we run are currently approved on a year-by- year basis. He feels that a definite decision must be xx made as to whether or not VOE, SDLC and Project Master are to be permanent pxxx parts of the school system.

An illustration of this concept would be the hypothetical case of a teacher not performing up to minimum standards. He is dismissed, but his department goes on. Thus, if the special programs are considered permanent, if teachers resign or are dismissed, they will be automatically raplaced, and budget allocations will be assured.

The members of the special programs group feel that three years is a sufficient trial period and that a decision should be made at this time as to permanence.

It was pointed out by several members that the fact that VOE I,II and SDLC have waiting lists of students trying to get in, and have received positive support from other teachers is an indication of some success.

It was decided to have the curriculum advisory committee representative bring this matter up at the next meeting of the CAC.

Please attach a copy of the agenda to this report.

COS/jb
9/7/77

FORMAT FOR COORDINATORS AND DEPARTMENT HEAD MEETINGS

USD #457

Garden City, Kansas

Nina Lance/Carol Hodgkinson
Secretary

9/13/77
Date

Carol Hodgkinson/Nina Lance
Department Coordinator or
Department Head

Members present:

Dorthy Bieber	Janice Henson
Winifred Koksol	Carolyn Neal
Nedra Heimer	Ken Brancaccio
Kitty Slover	Pam Brown
Jean Selichnow	(Wanda Maynard was at a meeting on the gifted program)
Carol Hodginson	

Review of discussion:

Introducation of Mr. Armstrong from American Book Company. Mr. Armstrong discussed his companies books, explaining materials that are available.

Explanation of the location of books (for 78-79 adoption) and time period for each (block) school to examine them.

Explanation of in-service Sept. 27 - Tues - Dart's Cafeteria
(Dr. James Howell - Wichita Rdg. Coordinator)

Discussion of mangement program vs curriculum; discussion to be extended.

Discussion of keeping reading program with Language Arts

LA- Discussion of ideas of what to do if a student does not pass K, 3, 6, 9, and 12 tests; continue thinking.

Memo to take to buildings to be sure LA Curriculum guide is being used and suggested revisions kept tabulated.

Mastery Tests: Do we buy commercial ones and revise to suit us or consider making our own; could consider using computor for compiling questions and scoring.

Please attach a copy of the agenda to this report.

COS/jb
9/7/77

Sept. 15, 1977

READING/LANG. ARTS COMMITTEE

RE: MEETING, Sept. 13

place; Alta Brown
Room 5

According to a memo from Mr. Stones, I am to send an agenda of each meeting to committee members. This time I will not break it down as to how much time is to be given to each item to be covered except the visit by the consultant from the AMERICAN BOOK COMPANY. If you have other things to be brought up feel free to bring them to our attention.

4:00 Glen Armstrong, consultant from American Book Company, wishes to visit with the committee.

4:20 Go over check-out rotation system for examination book copies.

Hear reports from buildings on pilot programs.

Discussion of Goals and Objectives for year.

Relaying of information which might be pertinent to this committee from the meeting of the Curriculum Committee which will meet the evening before our meeting.

Thank you.

Carol Hodgkinson

APPENDIX G

M E M O

DATE: September 7, 1977

TO: District Curriculum Coordinators
Ada Albrecht
Bob Brock
Dave Craft
Betty Dague
Elaine Ferris
Carol Hodgkinson
Marvin Hamman
Bernie Hauff
Dorothy Jacobs
Nina Lance
Melba Sherwood
Bernadine Sitts
Susan Taylor
Jim Tomayko
Jon Hoerman
Larry Walters
Merle Wiederstein
Darryl Woodson
Jack Ramos-Needham
Steve Mosler

FROM: Charles Stones, Director of Instruction

RE: Curriculum Coordinating Council Meeting,
September 12, 7:30 pm, Board Room

AGENDA

7:30 Introduction of Council (Please introduce yourself. State a positive feeling about your district or department. Also state an anticipated department goal for the year).

7:45 Review of decision making responsibility.

7:55 Values Education and Basic Skills Seminar discussion.

8:05 Review of Language Arts Goals and how these are to be used by the classroom teacher by Nina Lance.

8:20 Discussion of check point and critical skills evaluation. How may we proceed if a student does not measure up?

8:40 Summary of reading study plan for the coming year by Carol Hodgkinson.

8:55 Department monthly meeting schedule, time and location.

9:10 Review of coordinator reponsibility
A. Call the meeting
B. Send out an agenda
C. These in attendance and summary of the meeting to go to the Director of Instruction
D. Coordinator advice to each other

9:30 Adjourn

COS/jb
9/7/77

DISTRICT CURRICULUM COUNCIL September 12, 1977

The first meeting of the District Curriculum Council for the 1977-78 school year was held in the Board of Education room on Monday, September 12, at 7:30 p.m.

Each member introduced himself by identifying his area of supervision, by giving a positive statement concerning the work of the district, and by presenting some of the goals for the year. These goals suggested that members of the Council have many very worth-while plans, both for the committees and for the good of the students.

Mr. Charles Stones, chairman, reviewed the decision-making responsibiltiy and referred to Board Policy IFA.

A lengthy discussion of the Values Education and Basic Skills Seminar indicated that a number of teachers felt that this was very much worth while and helpful. The suggestion was that those who write dilemmas for use with students would need to use good judgment, to avoid problems and misunderstanding The feeling of a number of the members was that it would be helpful if more work were done and more opportunities were provided for the Basic Skills presentation; there might be a possibility that the local district could work with one or more other districts and thus cut down the expense.

Mrs. Nina Lance, chairman of the language arts groups, presented the goals and indicated some of the plans for the implementation of a testing program which will be used throughout the district. A part of the work involves writing the test/tests. The consensus was that the District Curriculum Council must support this important work. There were many questions concerning what is to be done, how it is to be done, when it is to be done, how the results are to be used, and various other features; from the discussion and from the questions, it was evident that much work still needs to be done.

Dr. Horace Good, Superintendents of Schools, spoke to the group and indicated his support and his appreciation for the efforts of the members of the Council. He spoke of the students' expectations, the families' expectations, and the teachers' expectations and what we must do to meet and to accomplish those expectations.

Discussion of the procedures which might be used when students do not measure up to the requirements established by the Language Arts Committee indicated, too, that there is still much work and study to be done, to come to a workable plan.

Mrs. Carol Hodgkinson's presentation of the reading study plan proved interesting and showed that pilot programs will be carried out in the various schools by using books and other materials provided by six publishing companies.

Mr. Stones referred to the monthly meeting schedule which he had worked out for the district, to avoid conflicts, especially for those who must meet with more than one of the committees.

A review of the coordinators' responsibilities provided direction to the members of the Council, especially, and provided continued suggestions for these members who served on the District Curriculum Council during the 1976-77 school year.

The lengthy, "full-of-business" meeting provided a challenge for all members of the council and showed that many staff members are dedicated to the task of improving the curriculum for all students in Unified School District #457.

APPENDIX D

Basic Goal #1:

The curriculum council will develop criteria for and a model of curriculum guides that encourages cross disciplinary skills in all departments and provides for creative solutions based upon research and knowledge.

Objectives for this goal:

1.1. Curriculum guides for the following departments will be developed according to this schedule:

1978-79:	Math.; Fine Arts; Physical Education; Industrial Arts; Home Economics; Vocational Agricultural; Foreign Language; and Business
1979-80:	Social Science
1980-81:	Science

1.2 These curriculum guides will be written according to the following suggested criteria:

a. They will identify the major skills involved in the discipline.

b. They will state specific objectives or concepts that would develop those skills at the levels served by the discipline (primary, intermediate, junior high, senior high).

c. They will include a chart that illustrates when each skill will be introduced, developed and maintained.

d. They will list which concepts and objectives are interdisciplinary in nature, should be reinforced in other classes, and/or are measurable by conventional paper and pencil tests.

e. The model for these guides will be Links in the Language Arts the guide prepared by the Language Arts representatives and published in 1978.

1.3 As curriculum guides are developed, an interdisciplinary curriculum guide will be prepared that incorporates concepts and objectives that should be applied on a district-wide basis. This guide will be continuously updated as more departments finish their individual guides.

*** Developed after our site visit.**

Basic Goal #2:

The curriculum council will develop a system of information sharing that will improve the communications between the members of the council, between the council and other professional staff in the district, and between the council and the broader community.

Objectives for this goal:

2.1 Communication among council (CAC) members:

- a. Utilization of monthly meeting agendas
- b. Agenda to include major reports from department heads on a scheduled basis.
- c. Opportunity for recognition of non-scheduled department head reports at all monthly meetings.
- d. (Possibility of) CAC meetings being (to be) conducted on a more structured basis, i.e., - partiamentary procedure utilized.

2.2 Communication between council (CAC) members and full district staff.

- a. Publication of monthly column in "S'Cool News" covering items of note, i.e., council decisions; specific curriculum changes and/or revision, special department activities, etc.
- b. Relaying of CAC discussion items and direction to full staff membership through departmental and building staff membership meetings.

2.3 Communication between council (CAC) and the broader community:

- a. Release to the news media (newspaper, radio and television) the following:
  - 1) CAC composition and function
  - 2) CAC goals and objectives
  - 3) Curricular evaluations and/or decision emerging from CAC meetings
  - 4) School activities which receive CAC approval and support
- b. Cultivation of a favorable relationship between CAC and news media.
- c. Encourage specific school/parent communication by means of:
  - 1) Demonstration/workshops for parents regarding instructional program contents and techniques.
  - 2) Individual school community activities, i.e., - P.T.O
  - 3) Publication of advance monthly school activity calendar.

Basic Goal #3:

The curriculum council will carry out activities designed to improve and enhance their ability to function as a team, to seek agreement and policy that defines the line of authority and the function of the council and its members in that policy, and to improve and develop the abilities of the individual members of the council to communicate and understand one another.

3.1 The council will develop and implement a communications network to facilitate the exchange of curriculum information.

   a. The network will be based on a written plan stating how Council members and others directly concerned with curriculum concerns are expected to share information and suggestions.

3.2 The Council will request that the Director of Instruction present an interpretation of the Council organizational chart.

   a. The presentation should first be made to the Council members at a regular meeting.

   b. The Director of Instruction will make available this same information to all other staff members.

   c. The presentations should reflect the necessity of curriculum recommendations being first directed to the appropriate decision - making level.

3.3 The Council will sponsor workshop activities to help individual members learn how to improve group interaction in large and small groups.

3.4 The Council will recommend that Council meetings be redesigned in order to facilitate productive work sessions.

   a. Members will at times be randomly grouped to discuss council concerns.

   b. Action and interaction groups will be formed at monthly meetings.

   c. Reaction and recommendation groups will be utilized.

   d. Other organizational patterns will be tried in order to break the "leader-listener" cycle.

3.5 The Council will develop methods useful in celebrating successes.

Basic Goal #4:

The curriculum council will seek to serve as a change agent in the district, and create a climate of acceptance for new ideas and programs by developing and carry out district wide staff development activities.

4.1 Develop guidelines for student/teacher relationships.

4.2 Make available to new staff alternative methods of discipline.

a. Through a self-evaluation attempt to educate staff away from behavior control toward behavior management.

b. Write a list of "Ten Commendments of Love and Caring" to post in each building.

c. Inservice day of mini-labs.

4.3 Development of programs to promote self-concept in children.

a. Research NAILS - New Adventures in Learning

b. Extension of Every Child a Winner through physical education.

c. Disseminate information to teach how self-concept affects all learning.

d. Search for other nationally validated programs for different disciplines.

e. In-service day of min-labs

4.4 Develop methods to encourage acceptance of new programs and those already in existence.

a. Bring in more exciting and knowledgeable people to give the existing program more impetus.

b. Urge principals to take a more active role in carrying out district wide programs.

c. In-service day of mini-labs

CONCLUDING SECTION:
LEARNINGS FROM THE CASE STUDIES

LEARNINGS FROM THE CASE STUDIES

Questioner:	Dr. Thorndike, how many cases do you need to establish a generalization?
E.L. Thorndike:	Well, I'd like two or three, but if you press me, I can do it with one.

Though this non-apocryphal exchange occurred in the 20's, and Dr. Thorndike was speaking of individuals as cases, its message is relevant for our inquiry. How confident can we be of any cross-site themes that emerge from these three case studies? We have an advantage in that the themes can be cross-checked with those emerging from those in the quantitative study of all 76 districts (Vol. III). As it turns out, the case study themes do not contradict those in the larger study, though they provide more illuminating explanatory detail, and suggest some new ideas.

The discussion below is organized in five sections: initiation of OD, the general approach taken, consultant support, costs, and benefits.

Initiation of OD program

In all three cases it is clear that strong support from the top line manager (given the Winnipeg decentralization, Cooper can be considered the de facto superintendent) is crucial. In Garden City the superintendent provided umbrella support; in Winnipeg and Adams, the superintendent was an active initiator and driver of the effort.

In all three cases, there seemed to be little environmental turbulence; the local community was not presenting acute problems for the district. The basic conditions of the context varied, but they were largely internal to the school district: in Winnipeg, decentralization; in Adams, reorganization; in Garden city, growth.

It also seems clear that fairly careful front-end planning took place in all three settings: the effort was not launched capriciously or in a piece-meal fashion. This was especially true in Winnipeg and Adams ("You ought to know why you are doing it", as one central office administrator remarked), but even in Garden City it took two years of planning before the first implementation steps for the Council.

Characteristically, this front-end planning was based on a fairly coherent vision of the projected program's purposes, and its underlying values and rationale, especially so in Adams County. In Adams and Winnipeg, the commitment was to system-level change, to increased participation, to careful goal-setting, and to redressing the balance between individual and organizational improvement. The goal-setting and participation themes were also visible in Garden City.

General Approach

In Winnipeg and Adams especially, the programs involved direct and explicit attention to organizational variables as such: communication, coordination, decision-making, climate. In Garden City this attention was less evident but growing.

All three districts operated under the assumption that structural changes would be needed: all created new operating groups at several levels, linked to each other. None took the structure existent at the time of program initiation for granted.

All three districts also seemed to be assuming that structural change was not enough. All built in direct attention to the content of curriculum in the district, and its meaning for delivery of educational services. Curriculum development is not organization development, but these districts, especially Adams, seemed to consider it as a meaningful subtask in the overall effort. For Garden City, it was perhaps the central developmental task.

In Winnipeg and Adams, there was another sense in which "structure is not enough". They included a strong emphasis in skill development for role occupants, so they would be able to function more adequately in the new structure. As we have seen in the larger district study (Vol. III), personnel development alone tends to be ineffective, probably because it encourages inattention to needed changes in the organizational setting; some earlier quotes we have provided suggest that solely personalistic approaches, in the absence of top managers' commitment and willingness to institute structural changes, may increase frustration and the likelihood of program failure.

We can also note that the OD programs in all three sites were not a superficial add-on, but a "way of life". For example, in Adams, the "perceiver" program was used not only in the hiring of new personnel, but as a routine support for goal-setting and development planning for role occupants; in Winnipeg the ADOD program was aimed at helping line administrators do their regular jobs in a change-supportive way; in Garden City the curriculum council was the main means for goal-setting and coordinative planning in the district.

It also seems clear that, especially in Adams and Winnipeg, a good deal of adaptation/evolution occurred in the OD program over time. Approaches developed outside the district (MBO, the General Motors survey feedback approach) were revised considerably to fit local needs. And in all three districts, the program was not wholly pre-envisioned: it developed organically and eclectically to meet the exigencies of situations. However, this development did not seem to be expedient: it was informed by underlying principles, as we have noted above.

Winnipeg and Adams took the adaptation principle another step: though the insider consultants developed local program "packages" (such as the survey feedback design in Winnipeg or the MBO program in Adams), there was usually a second adaptive step when the package was used with any particular subgroup such as a building faculty.

Consultant Support

All three districts used outside consultants they considered particularly competent. Winnipeg and Adams tended to use outsiders selectively, for spot input in early stages of program development, and for training of insiders. Outsiders were thus seen as distinctly disposable: once their expertise had been utilized in program development, they tended to be discarded. Though Garden City used the LINK staffers more durably, as a sort of extension of their own capabilities, they too made only limited use of outsiders in comparison with the time invested by insiders.

Winnipeg and Adams both had insiders who were strong, quite sophisticated about OD, and well linked to top management: Guest's relationship with Bailey in Adams, and Reimer/Trump's relationship with Cooper seemed critical to the success of the effort. In Garden City, the main insider, Stones, was sophisticated about curriculum development, and well linked to Good. This generalization goes a bit deeper than the idea noted in the district study that insiders, often line managers, are the main change agents. It suggests that a vigorous partnership is needed between line managers and a strong, sophisticated OD specialist.

In both Winnipeg and Adams, the OD specialists played important roles in over-all program planning, development of specific program packages, training of others as internal trainers and brokering outside expertise as needed.

Finally, in all three sites, the idea of multiplier effects was important. OD interventions were not just run by the main change agents - inside or outside - and left at that. Rather, the regular practice, most strongly in Adams, was to develop district personnel who could train others. Thus program participants are not just "doing" a program the first time through, but are engaged in second-order learning--learning how to carry out the program with others. The programs thus have a "professionalizing" effect, creating an internal cadre of change agents.

Costs

In all three districts, the out-of-pocket dollar costs were quite small, typically less than ½ of 1% of over-all budget, and as we have noted, of the same order as funds typically spent on in-service education. Thus they are presumably not particularly difficult to justify to boards of education.

The time and energy costs are something else. The "way of life" aspect of the programs means at one level that OD is simply the improvement/change-supportive/developmental aspect of what any particular role occupant is expected to be doing from day to day. So it should not in principle seem like extra effort. In fact, however, at all three sites, problems of overload and pressure were reported. No matter how "routinized" OD becomes, it is still something of a strain to confront organizational issues, consider alternatives, learn how to train others, clarify one's goals, plan strategies, etc.--as contrasted with day-to-day teaching or managing. The actual person-days invested for participants most actively involved (central insiders not included), seem to be something like 15-25 days a year in Winnipeg (of which half was "contributed" by the participant), a similar amount in Adams, and perhaps 15 days a year in Garden City (more than half "contributed") on the Council work, and from 5 to 20 days on innovation adoption work. Thus we are speaking of something like 10% of a typical actively involved participant's time being spent on OD activities. In some cases, the interview data suggest that this felt like an "add-on"; people had not been able to let go of, or had not been released from other ongoing responsibilities. Further, the feeling of being "meetinged to death" can arise quite easily, it seems.

The time costs for inside change agents are much larger: in Winnipeg, Reimer and Trump worked 100% for two years, then half-time each for the third year; in Adams, Guest was full time, putting most of his energy on the OD program; in Garden City, Stones, as full-time curriculum director, probably put in on the order of one third to one-half time on the Council and the innovations. These figures suggest that an OD program requires something like a full-time inside change agent for every 1,000 staff members. Here again, the actual dollar costs are small in relative terms. But the commitment and sustained energy required by the focal change agent or agents must be seen as substantial.

We should note too that the annual time costs we are describing can be expected, judging from these cases, to continue for a matter of three to five years before the OD program is institutionalized and can survive beyond the protective support of its initiators. Further, certain time costs will probably continue on a permanent basis, although it will likely become a way of life of dealing with organizational functioning. In a district like Adams where really comprehensive changes have occurred over five years, the OD director speaks of ten years being needed for institutionalization. (In passing, we should note that the cases do not tell us very much about the institutionalization process: what is needed before the program is considered part of the "lightly scrutinized" part of the district budget. The presence of full-time or nearly full-time OD positions is perhaps a necessary but not sufficient condition; the presence of various internal cadres may help; the movement of program components (such as MBO and curriculum planning methods) into the "ordinary" part of life in the system is undoubtedly necessary. But how all this happens is not at all clear).

Benefits

It seems evident in all three cases that the OD programs did improve communication, enhance decision-making participation at lower levels, clarify goals, aid coordination, improve satisfaction and climate. At least this is true for roles and groups who participated actively in program activities. And the testimony of most participants is that the benefits are worth the costs. So the programs "work".

But we should note that though in Winnipeg and Adams all, or nearly all central office personnel and principals have been actively involved, the penetration to the teachers has been more limited, with perhaps one third of teachers involved. In Garden City, though the Council nominally involves all teachers, it seems likely that between it and the innovation-adoption work not more than a quarter of teachers have been active participants.

And the impact on students remains somewhat ambiguous, though it is asserted to have taken place. Even where student affective or achievement data are available, the direct linkage between such outcomes and the OD program's activities has rarely been demonstrated. It is clearest where some program component has directly focussed on curriculum or teaching methods, as such--but even there, OD programs do not seem to be any more crisply evaluated than are school programs in general.

Though the Winnipeg and Adams programs contained a good deal of short-run testimony-level evaluation, enough to suggest users' satisfaction with what the programs were doing, and outline areas (such as overload, program ambiguity, etc.) where corrective action was needed, neither contains systematic evaluation; Garden City evaluation data are minimal. It can be argued, at one level, that impeccable evaluation data are not necessary; complex and energy-consuming programs of this short will only survive if they are inherently satisfying to their users. Boards of education, given the minimal dollars involved, will undoubtedly be influenced by justificatory data like those noted in the case study appendices, and take administrators' recommendations for program continuation--if it can also be plausibly shown that student achievement is maintained, teacher turnover is less, and so on. The causal linkage to the OD program as such will ordinarily be taken on faith.* As we shall argue in Vol. V, however, cleaner evaluation data may make some difference in the diffusion of OD programs to other districts, especially the diffusion of "proven" program components (such as the Winnipeg survey feedback design, or the Adams SRI or MBO programs).

These generalizations across three successful cases give us a somewhat fuller idea than the district study did of what the operating issues in OD programs are. They do not contradict the quantitative findings, but they suggest some new ideas: the need for a reasonably stable district environment, the importance of close linkage between an internal OD specialist and the top manager; the necessity for a clear, coherent image of the program; the "way of life" aspect of OD programs; the "multiplier" effect achieved by training internal trainers; and the longer time line needed for institutionlization.

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*We might reiterate here a point made elsewhere (Miles, M.B. "Diffusing OD in Schools: A Critique", Education and Urban Society, Vol. 8(2); 242-254, 1976); though hundreds of profit-making organizations have ongoing OD programs, they are rarely continued (or discontinued) on grounds that they make or lose money for the company. There is only one known instance of a firm's treating its OD program as a trade secret, which if known would reduce its competitive advantage.